HRMS End User Training

Basic: Employee Hiring & Processing

Training Guide

Course Objectives

Upon completion of this course, you will be able to:

- Understand the key components and terms of Personnel Administration.
- Hire and rehire an employee using Human Resource Management System (HRMS).
- Display and change employee information.
- Process an Employee Appointment Change.
- Process a Leave of Absence.
- Perform an Employee Separation.
- Process a Change of Status.

Personnel Administration Overview

Personnel Administration Overview

- Upon completion of this section, you will be able to:
  - Explain the Personnel Administration components.
  - Define Personnel Administration roles as they relate to the course.
  - Identify other HRMS modules that share integration with Personnel Administration components.

Key Terms

Integration	The ability to share data with other HRMS components.
Effective Dating	This is the date which data on the infotype becomes valid. It is based upon a valid start and end date.
Infotype	This is a screen that is used to enter employee information and to group related data fields together.

Key Terms – cont'd

Personnel Action	Processes used to record personnel actions such as hiring, appointment change or separation.
Transaction	How you will access the employees' record to view or update. All transactions have transaction codes to access the employee's record.

Personnel Administration Roles

- An end users position determines what role is assigned and the level of HRMS access available.
- The following roles exist for Personnel Administration:

Personnel Administrator Processor	Creates and maintains employee new hire and rehire information, appointment changes, separations, extended leave of absences and runs reports.
Personnel Administrator Inquirer	Views employee's information once entered into HRMS.
Personnel Administrator Supervisor	Provides oversight for the Personnel Administration Processor and Inquirer as well as running reports.

Integration With Other HRMS Components

- HRMS is an ***integrated*** system, with the ability to shared data with other HRMS components.
- It allows real-time transmission from Personnel Administration to:
  - Organizational Management
  - Personnel Administration
  - Payroll
  - Benefits
  - Time Management
- Information provided during hiring is transferred to payroll in real-time, qualifying a new employee for immediate payroll processing.
  - Department of Enterprise Services recommends entries in HRMS be completed **BEFORE** DAY 3 of the Payroll Processing Cycle.

Effective Dating

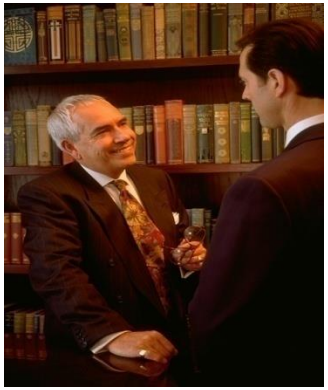
- HRMS allows you to enter an **"*effective date*"** when creating infotype records.
- You can enter information into HRMS at any time, before or after the employee information changes.
- The effective date is based upon a valid start date and a valid end (delimit) date.

Note: The end date might default to 12/31/9999. Verify the desired end date prior to saving the action.

Effective Dating Example

June 5th – Marsha, the Personnel Administration Processor, receives notification of Kevin's retirement scheduled for July 31st

June 1st – Kevin gives a letter to his immediate supervisor that outlines a retirement date of July 31st



June 8th – Marsha enters Kevin's retirement into HRMS to become effective on July 31st

July 31st – Kevin retires with no data entry needed as HRMS activates retirement based on effective data entered on June 8th

Effective Dating – New Hires and Appointment Changes

Use CAUTION when using effective dating on New Hires and Appointment Changes.

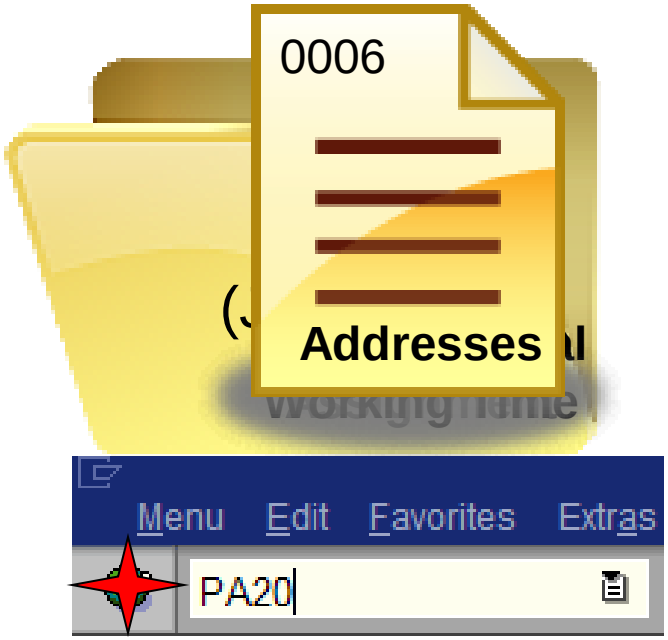
- Although effective dating is beneficial to agencies, be aware that back-dating could adversely affect other components in HRMS.
- If the employee did not start on the date that was entered into HRMS, there are procedures in the OLQR that outline specific scenarios.
  - By back-dating an employee's personnel action it can cause complications in payroll if it has been processed and even if the employee has no earnings for that pay period.

Infotypes

- An ***infotype*** is a screen within a transaction in which specific criteria is entered into individual employee files or records.

  - Infotypes are like documents in an employee's (electronic) personnel file.
- The infotypes are guided by your assigned role and are determined by the action you are performing.
- During a ***personnel action***, infotypes are grouped together to help navigate from screen to screen.
  - Therefore, there is no need to worry about missing required data fields.

Infotype Examples

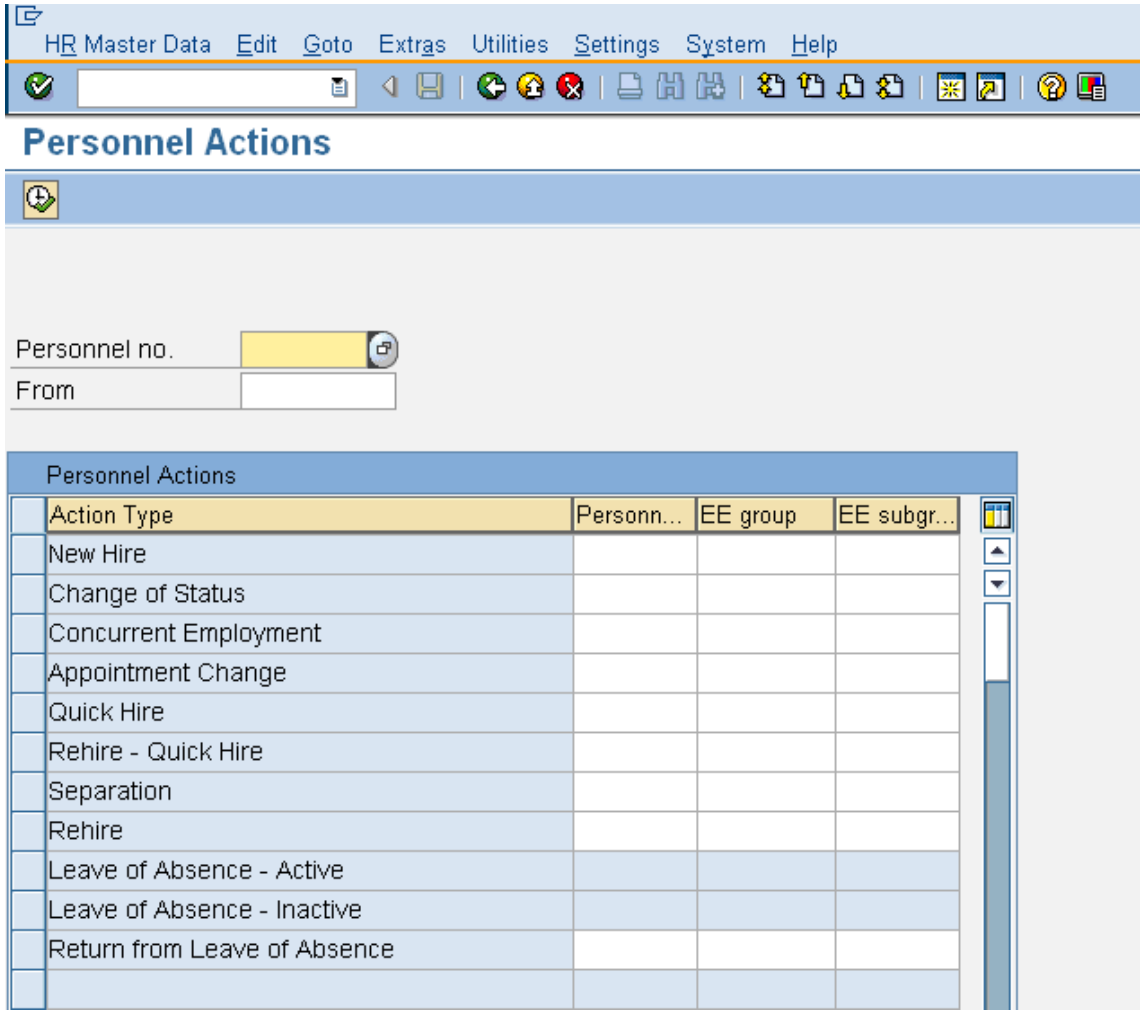


Personnel Actions

- ***Personnel actions*** are processes used to record personnel events such as hiring, appointment change or separation.
- Each personnel action contains a set or group of infotypes that record all the information necessary for an event to be recorded.
- For example, the New Hire action contains linked infotypes that walk you through entry of employee information.
  - Infotypes you access display in consecutive order until all required data is entered.

Accessing Personnel Actions

- The menu of *Personnel Actions* **(PA40)** allows you to choose the action you want to complete.
- The action you choose prompts you to complete the required information for that action.



Review Questions

1. What three roles are part of the Personnel Administration?

   Personnel Administration Processor, Personnel Administration Inquirer and Personnel Administration Supervisor

2. Each transaction is assigned a _____?

   Transaction Code

3. This HRMS feature allows information to be entered into the system at any time by using a valid start and end (delimit) date.

   Effective Dating

Display and Maintain Employee Master Data

Display and Maintain Employee HR Master Data Overview

Upon completion of this section, you will be able to:

- Describe the differences between the Display actions and the Maintain actions.
- Review the Display, Copy, and Change Functions and understand the importance of the information in each infotype.

Key Term

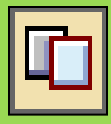
Master Data	This is essential personnel information that includes personal and organizational data which is unique to each employee.

Function Keys

Create

- Creates a new infotype record

- Use the **Create** function when creating new infotypes outside of using personnel actions. Maintains data history.



Copy

- Creates a new infotype record

- Use the **Copy** function to ‘copy’ existing infotype records and make changes in the appropriate infotype fields. Maintains data history.

Function Keys – cont'd

Delimit

- End dates an infotype record

- Use the **Delimit** function to put a stop date on the record, but maintain the history of former records. Maintains data history.

Change

- Correcting errors

- Use the **Change** function to replace the previous infotype. Does not maintain data history.

Function Keys – cont'd

Display

- View an infotype

- Use the **Display** function to view one infotype at a time.

Overview

- Displays history of an infotype

- Use the **Overview** function to show a list of records created for an infotype.

Accessing Infotypes – Display and Maintain

- HRMS allows you to update infotypes while keeping a history to the infotype.
- There are two ways to update/maintain infotypes:
  - Maintain (**PA30**)
    - Update specific infotypes one at a time.
  - Personnel actions (**PA40**)
    - Use to process personnel actions such as a New Hire which groups the necessary infotypes needed to process the action.
- You can also view employee information:
  - Display (**PA20**)
    - View infotypes one at a time.
  - Personnel File (**PA10**)
    - View the entire employee's record.

HRMS Activity

Maintain Employee Master Data

Audit Tool:

Logged Changes in Infotype Data report

- Helps identify data changes according to personnel numbers, Infotype and/or date and time.
- Run this report daily as an audit resource tool.
- Refer to the OLQR User Procedure: **Logged changes in infotype data**
- Access the Logged Changes in Infotype Data by using the transaction code **S_AHR_61016380**

Review Questions

- **Match the icon to its function:**

Change – To change the record with no history.

Overview – To view all actions associated with an infotype.

Copy – To update the record while keeping a history.

- **In most circumstances, should you use the Copy or Change action to update employee information?**

New Hire

New Hire Overview

Upon completion of this section, you will be able to:

- Identify the structure of a personnel action.
- Navigate through the Employee Hiring infotypes and understand the importance of the information in each infotype.
- Complete a New Hire action in HRMS.

Key Terms

Personnel Number	The unique identifying number for an employee.
Reference Personnel Number	Is a link between two personnel numbers and allows the employee to share certain infotypes such as *Addresses* (0006).
Next Increase	This is the date of the next scheduled increase in pay. This is also known as the periodic increment date.

Personnel Number

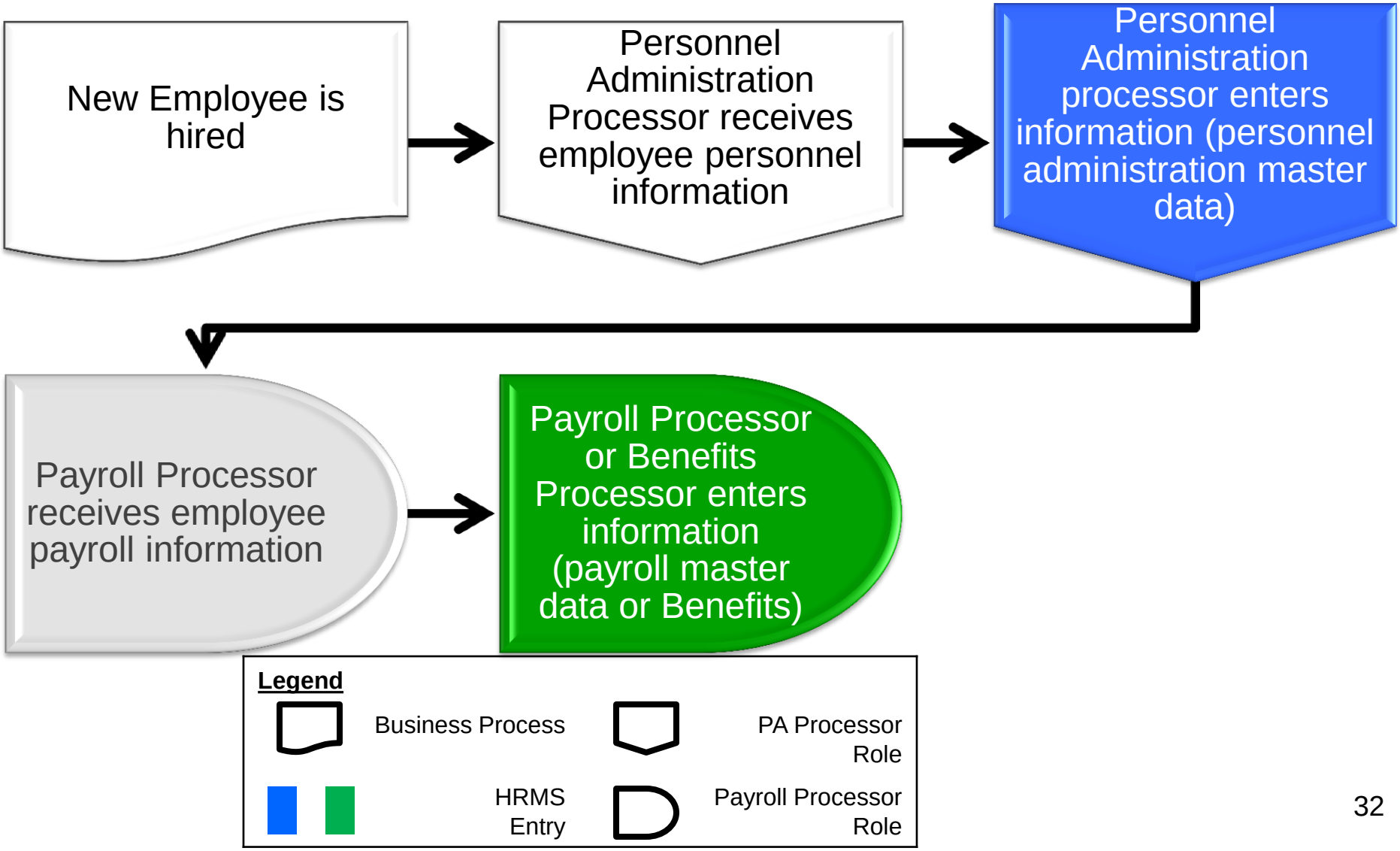
- ***Personnel Numbers*** are automatically assigned to an employee and they are never repeated. All previous employees prior to conversion have been assigned a Personnel Number through Data Warehouse or HRMS.
- New Employees are assigned new Personnel Numbers.
  - They have never worked for the State of Washington.
  - They were previously employed with the State of Washington, but prior to HRMS being implemented.

Note: Be sure to request a new hire check with the DES Service Center prior to entering a new hire into the system. This can be done by emailing servicecenter@des.wa.gov

Personnel Number – cont'd

- Employees may have two 'active' assigned personnel numbers simultaneously. This is known as concurrent appointment.
  - An employee works in more than one position at the same time in different agencies or personnel areas or works in more than one position in the same personnel area when one appointment is hourly and the other appointment is monthly. HRMS will assign a new personnel number for the employee's additional concurrent appointment.
- During a concurrent appointment the employee is assigned a Primary personnel number for one agency (or position) and a ****reference personnel number*** for the other.

New Hire Process Flow



Hire a New Employee

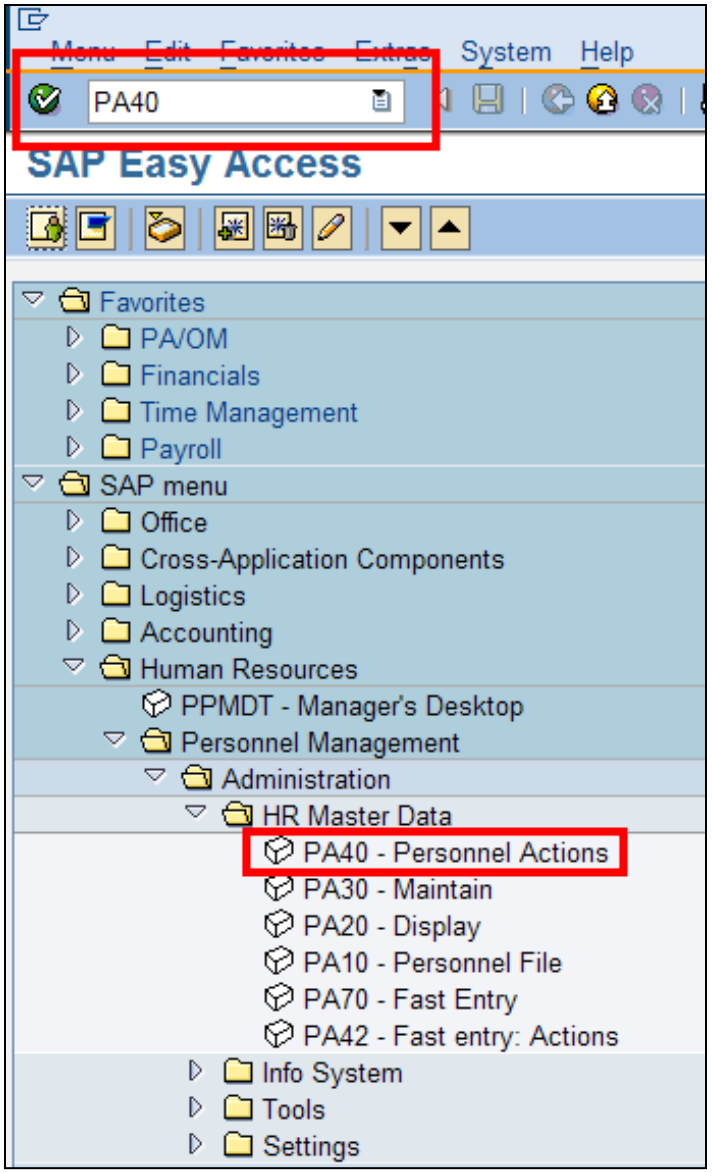
- Use the Hire action to enter information for an employee that does not already exist in HRMS.
- If the employee already has a personnel number in HRMS, use the Rehire action.
- If the employee already has a personnel number prior to HRMS you would use the New Hire action utilizing the personnel number for the employee.
- The Hire action moves you through each infotype which requires certain information to hire an employee.

Hire Infotypes

- Create the following infotypes during the Hire action including:
  - *Actions (0000)*
  - *Personal Data* (0002)
  - *Organizational Assignment* (0001)
  - *Contract Elements* (0016)
  - *Monitoring of Tasks* (0019)
  - *Addresses* (0006)
  - *Planned Working Time* (0007)
  - *Education* (0022)
  - *Date Specifications* (0041)
  - *Additional Personal Data* (0077)
  - *Military Status* (0081)
  - *Create Time Specifications / Employment* (0552)
  - *Basic Pay* (0008)

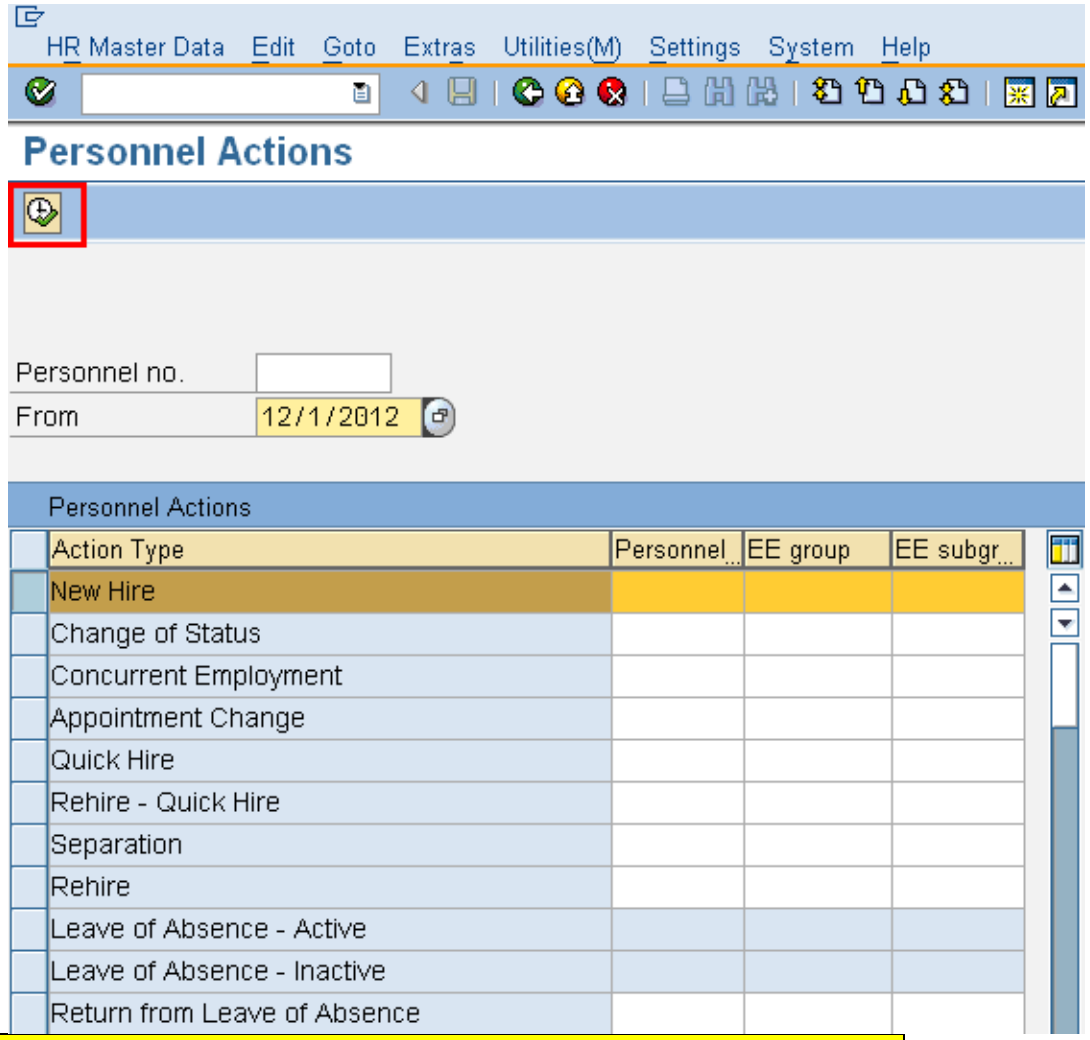
New Hire Action

- To create a Hire Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command field**



New Hire Personnel Action

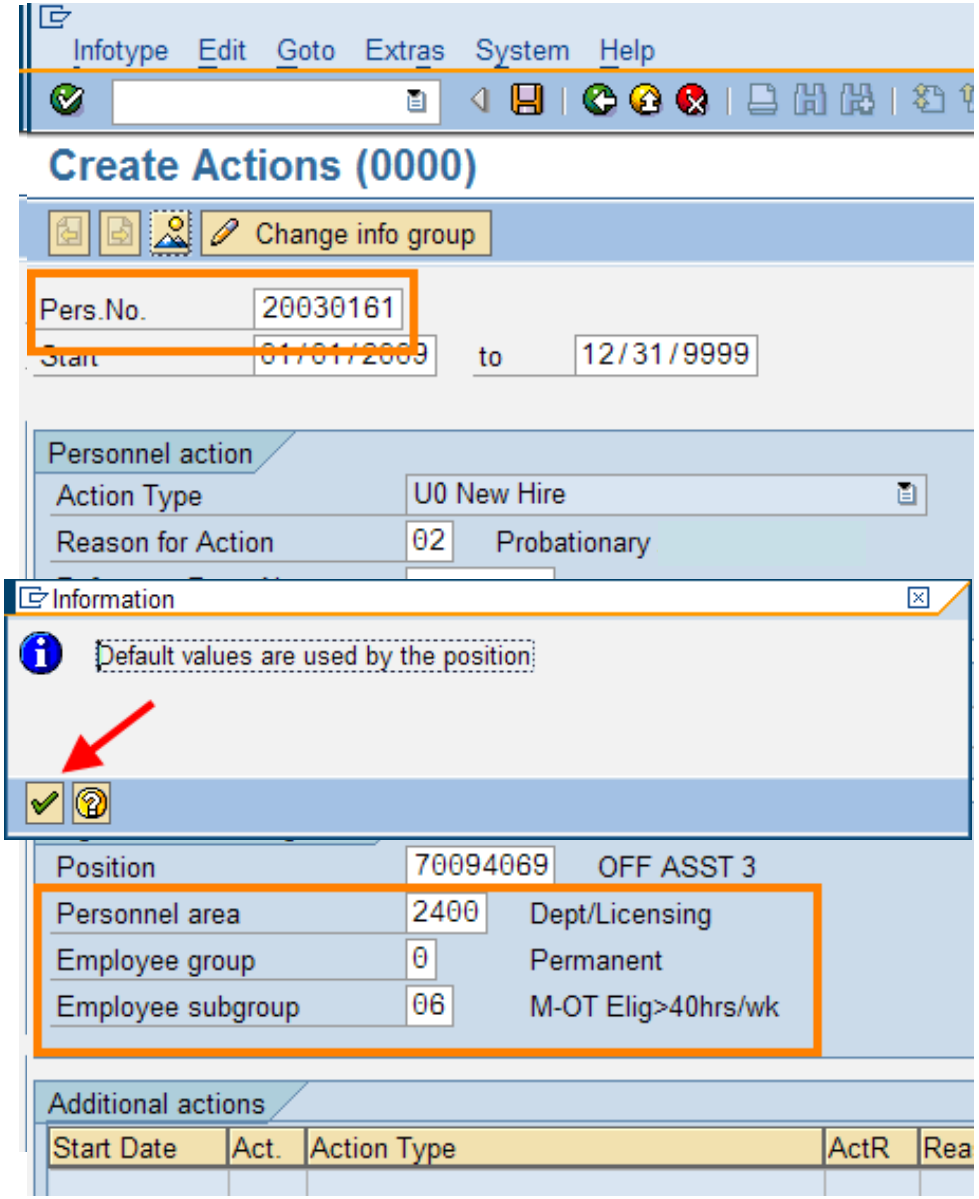
- During the hire action, the system assigns the new employee a unique number.
- Field to complete:
  - **From** (Date of Hire)
    - Example: 1/1/2015
- To access the Hire action, click the box to the left of New Hire.
- Click **(Execute)** to execute the action.



Note: A personnel number is not required to complete the Hire action.

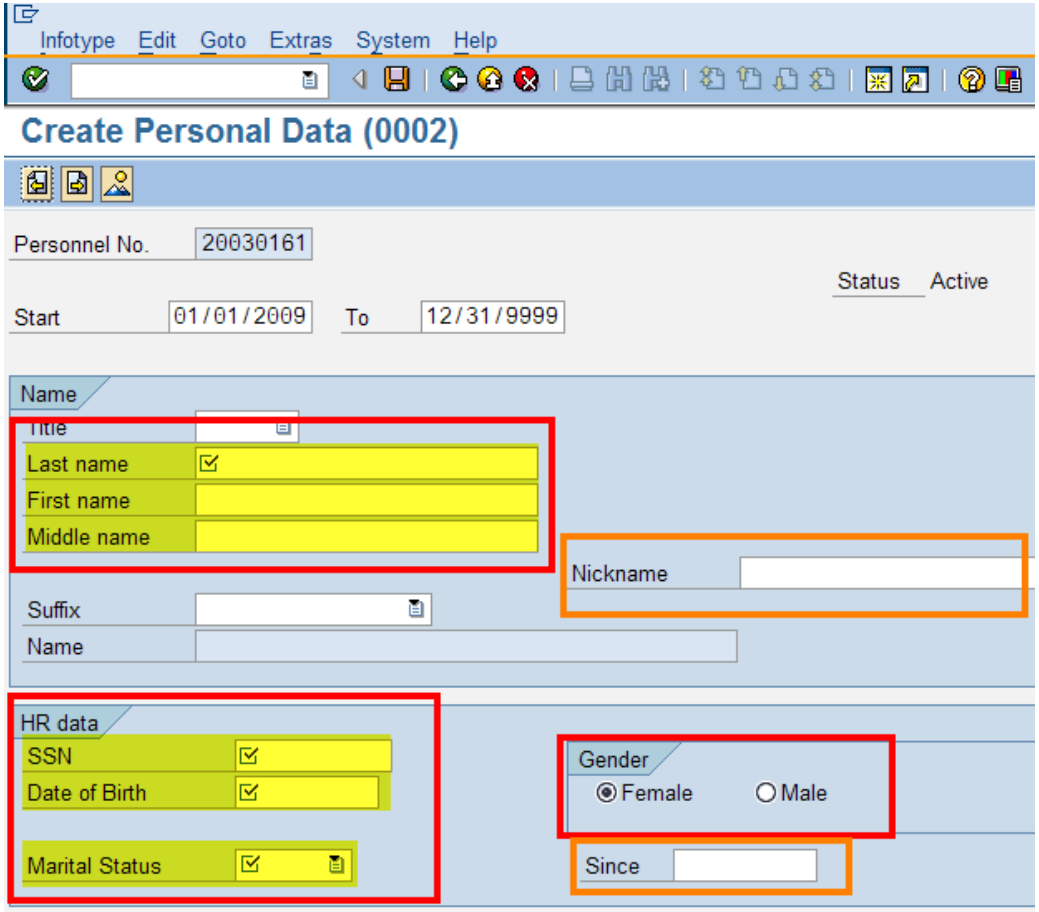
Actions (0000)

- The Actions infotype records the hire action reason position number for the employee.
- Fields to complete:
  - **Reason for Action** (use the matchcode)
  - **Position**
- Click **(Enter)** to validate and populate the following fields:
  - **Personnel Area**
  - **Employee Group**
  - **Employee Sub-group**
- When finished, click **(Enter)** and then click **(Save)**.



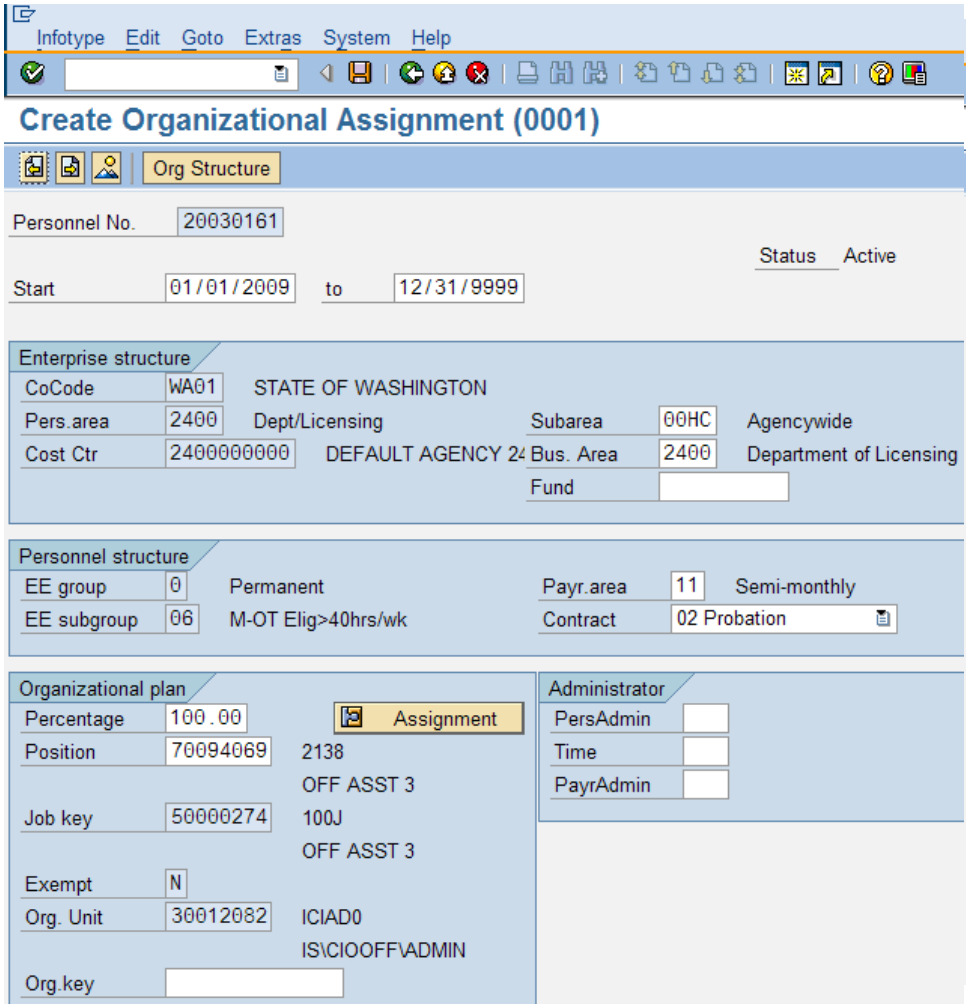
***Personal Data* (0002)**

- The Personal Data infotype records data to identify an employee.
- Fields to complete:
  - **Last name**
  - **First name**
  - **Middle name (optional)**
  - **SSN**
  - **Date of birth**
  - **Marital status**
  - **Gender**
- When finished, click **(Enter)** and then click **(Save)**.



Organizational Assignment (0001)

- The Organizational Assignment infotype records the assignment of an employee in the Organizational Structure.
- Fields required to complete:
  - **Contract**
    - Permanent (System Default)
- Optional fields:
  - **Org. key**
  - **Administrator – Time**
- When finished, click **(Enter)** and then click **(Save)**.



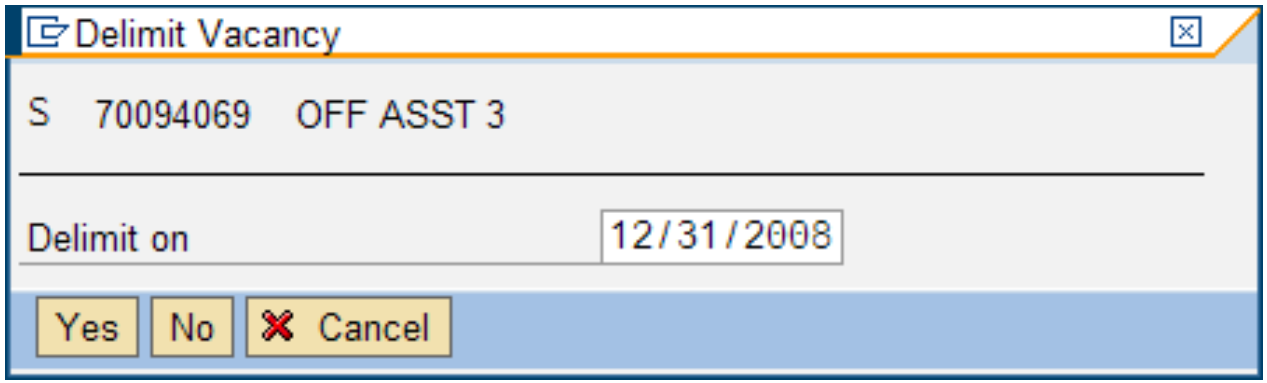
Delimit Vacancy

A feature used to report vacant positions. Information will be updated on the *Position Vacancy* infotype located in Organizational Management.

- This popup window will appear if the position is vacant or if multi-filled.

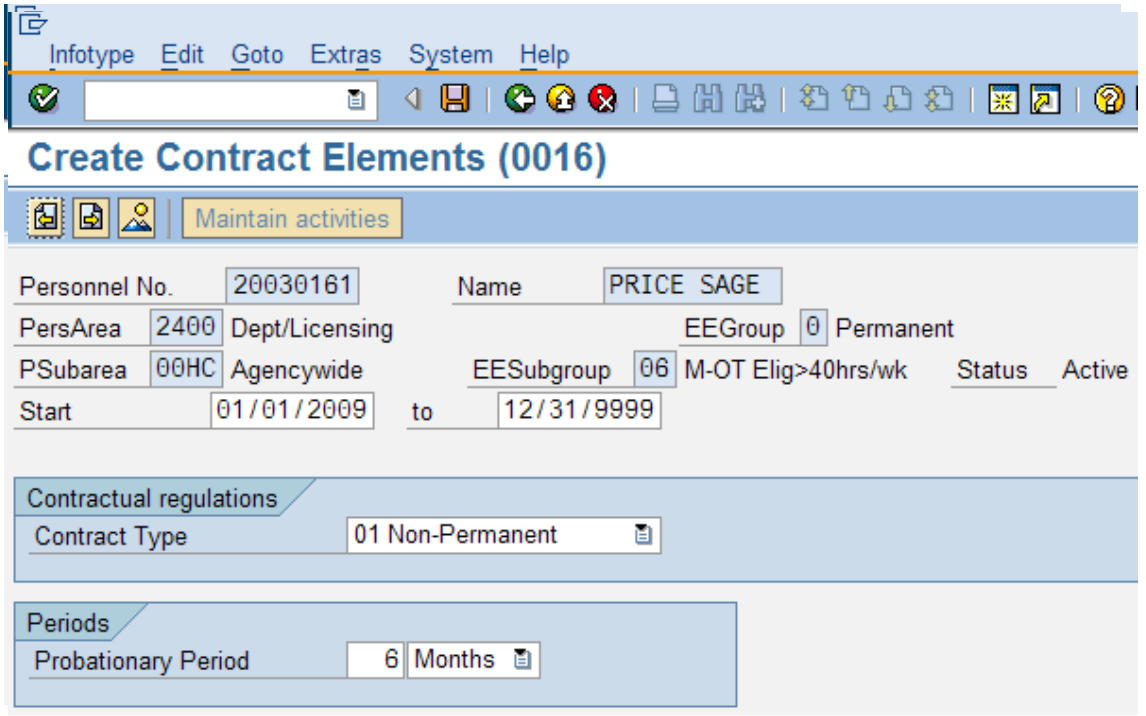
- Click 'Yes' to delimit the vacancy.
- Click 'No' to not delimit the vacancy.

Note: If the position is multi-filled select 'No'.



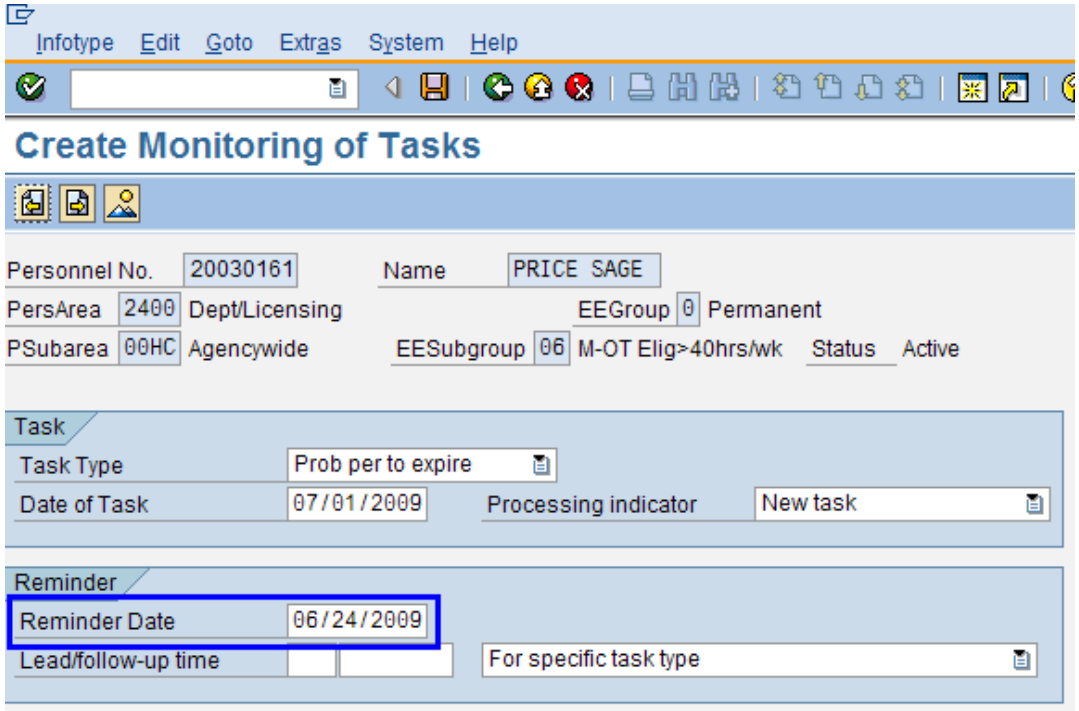
Contract Elements (0016)

- The Contract Elements infotype tracks an employee's state status (permanent or non-permanent).
- Field required to complete:
  - **Contract type**
- Optional field:
  - Probationary period
- When finished, click **(Enter)** and then click **(Save)**.



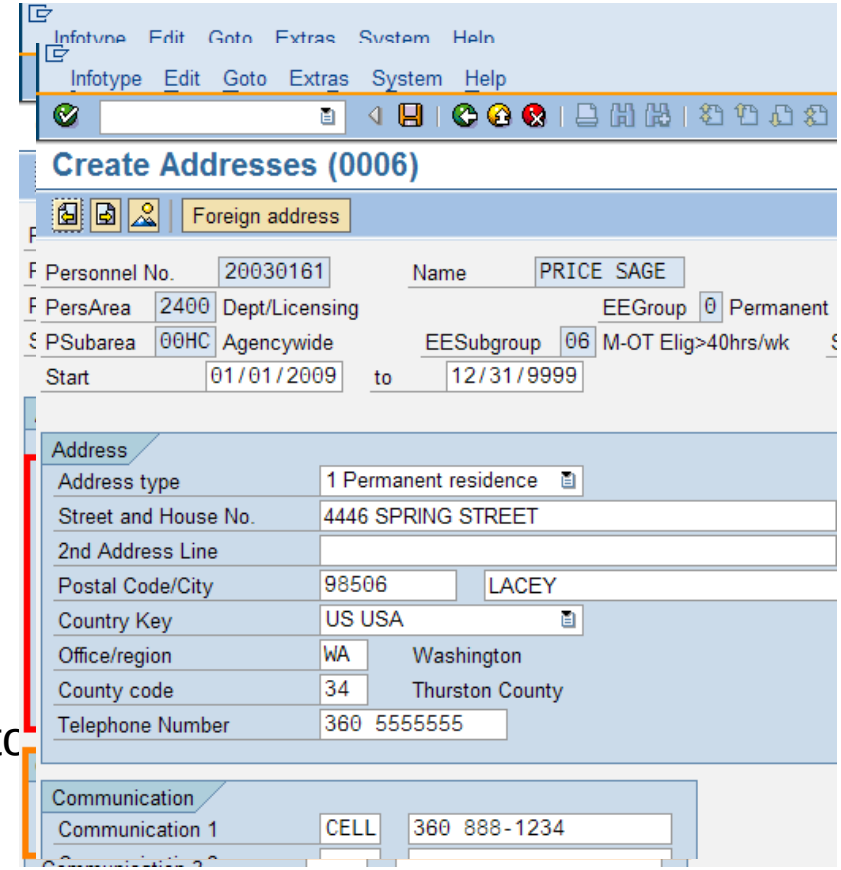
Monitoring of Tasks (0019)

- The Monitoring of Tasks infotype tracks the dates on which an employee moves from non-permanent status to permanent status.
- Fields to complete:
  - **Reminder Date** or
  - **Lead/follow-up time**
- When finished, click **(Enter)** and then click **(Save)**.



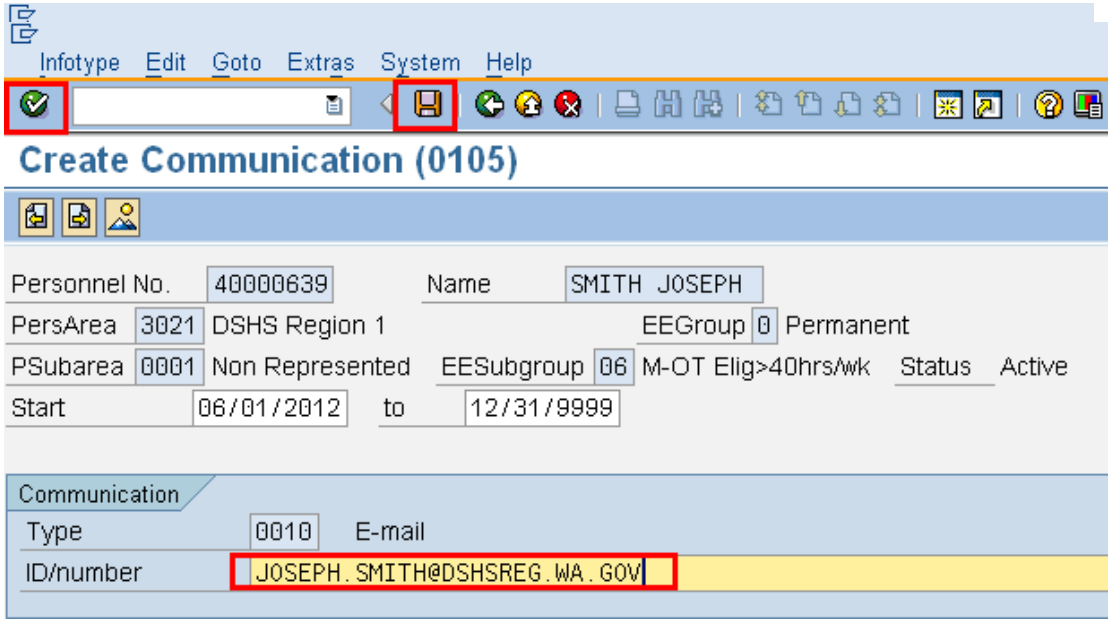
Addresses (0006)

- The *Addresses* infotype records and stores address data on an employee.
- Fields to complete:
  - **Address type**
    - *Permanent residence (required)*
  - **Street/House no.**
  - **Postal code** *(Zip Code)* / **City**
  - **Office/region** *(State)*
  - **County code**
  - **Telephone number**
- This information is used to:
  - Calculate tax rates
  - The Permanent residence type is used to send benefit information to Department of Retirement Systems and Heath Care Authority
- When finished, click (**Enter**) and then click (**Save**).



Communications (0105)

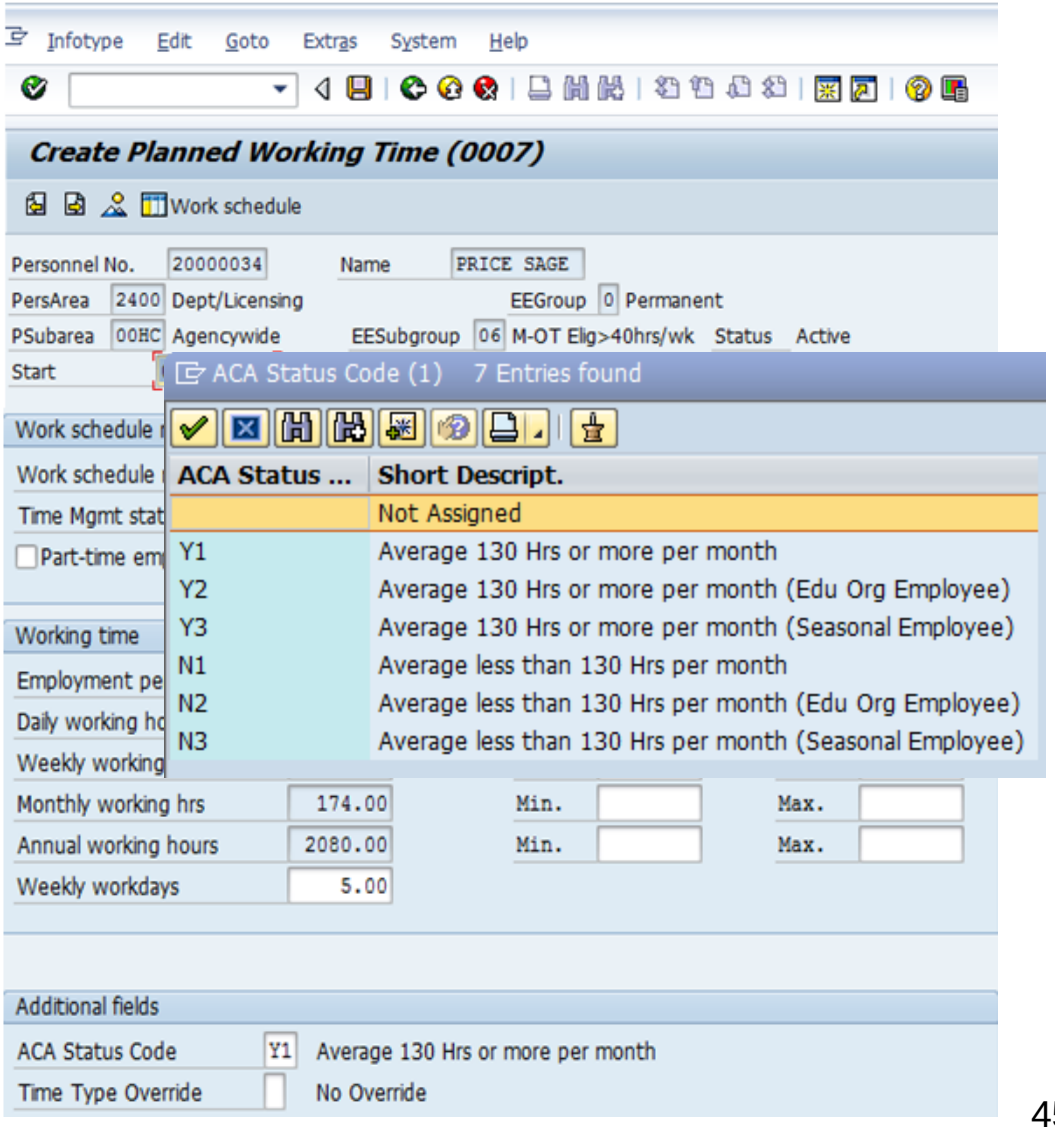
- The communications infotype is used to establish the employee's email address to be used.
- Field to complete:
  - **ID/number**
- When finished, click **(Enter)** and then click **(Save)**.



Note:
If you do not know the employee's email address at time of hire, click the **next** record button to move to next infotype.

Planned Working Time (0007)

- Fields to complete:
  - **Work schedule rule**
  - **Time Mgmt status**
  - **Additional time ID**
  - **Employment percent**
  - **ACA Status Code**
  - **Time Type Override***
- When finished, click **(Enter)** and then click **(Save)**.



*** Note:**

The Time Type Override box is to only be used by agencies who intend to use TLA

Available Work Schedules:

- There are more than 50 work schedules in HRMS.
- Typically, the work schedule is based on a 40-hour week, but HRMS accommodates non-traditional schedules.
  - Rotating work weeks
  - Altered work days (flex schedules)
  - Shortened work weeks
  - 24/7 schedules

Restrict Value Range (1) 53 Entries found

Restrictions

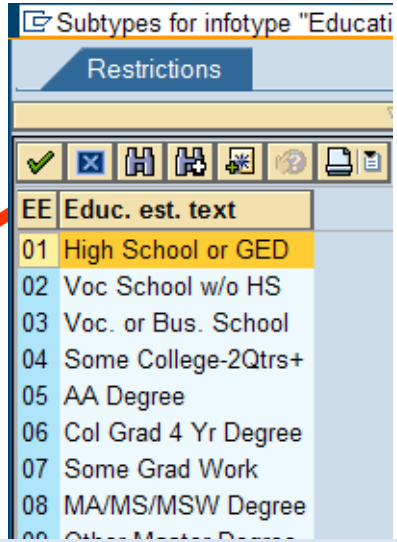
ES grouping: 2
Holiday Calendar ID: 5C
PS grouping: 10

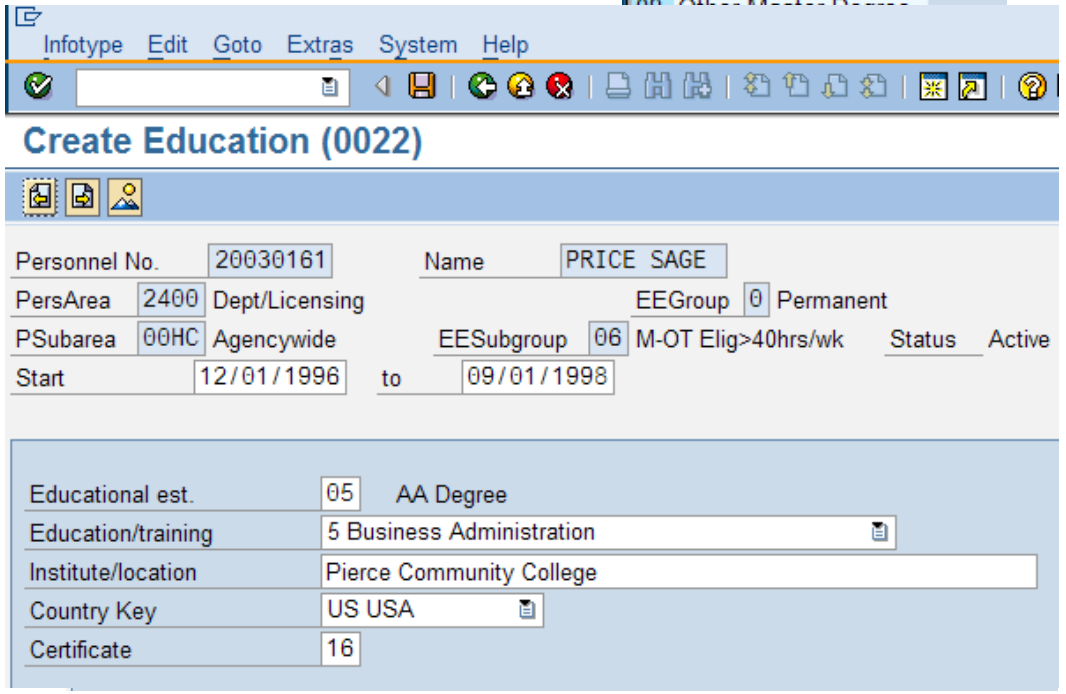
WS r...	Work schedule rule text	PWS	Start Date	End Date
FULL	5-8s: M-F 8 hpd	P001	01/01/1990	12/31/9999
R003	5-8s: T-St, 8 hpd	P003	01/01/1990	12/31/9999
R005	5-8s: W-Sn, 8 hpd	P005	01/01/1990	12/31/9999
R007	5-8s: Th-M, 8 hpd	P007	01/01/1990	12/31/9999
R009	5-8s: F-T, 8 hpd	P009	01/01/1990	12/31/9999
R011	5-8s: St-W, 8 hpd	P011	01/01/1990	12/31/9999
R013	5-8s: Sn-Th, 8 hpd	P013	01/01/1990	12/31/9999
R015	4-10s: M-Th, 10 hpd	P015	01/01/1990	12/31/9999
R017	4-10s: T-F, 10 hpd	P017	01/01/1990	12/31/9999
R019	4-10s: W-St, 10 hpd	P019	01/01/1990	12/31/9999
R021	4-10s: Th-Sn, 10 hpd	P021	01/01/1990	12/31/9999
R023	4-10s: F-M, 10 hpd	P023	01/01/1990	12/31/9999
R025	4-10s: St-T, 10 hpd	P025	01/01/1990	12/31/9999
R027	4-10s: Sn-W, 10 hpd	P027	01/01/1990	12/31/9999
R030	24/7: M-Sn, 24 hpd	P029	01/01/1990	12/31/9999
R031	4-9s/4: M-Th 9, F 4	P031	01/01/1990	12/31/9999
R032	4-9s/4: M-Th 9, Sn 4	P032	01/01/1990	12/31/9999
R033	4-9s/4: T-F 9, St 4	P033	01/01/1990	12/31/9999
R035	4-9s/4: W-St 9, Sn 4	P035	01/01/1990	12/31/9999
R037	4-9s/4: Th-Sn 9, M 4	P037	01/01/1990	12/31/9999
R039	4-9s/4: F-M 9, T 4	P039	01/01/1990	12/31/9999
R041	4-9s/4: St-T 9, W 4	P041	01/01/1990	12/31/9999
R043	4-9s/4: Sn-W 9, Th 4	P043	01/01/1990	12/31/9999
R045	2Wk:M-Th 9, F 8, 2nd F 0	P045	01/01/1990	12/31/9999
R047	2Wk: M-Th 9, F 0, 2nd F 8	P047	01/01/1990	12/31/9999
R049	2Wk: M-F 9, 2nd Th 8, F 0	P049	01/01/1990	12/31/9999
R051	2Wk: M 8, T-F 9, 2nd M 0	P051	01/01/1990	12/31/9999
R053	2Wk: M 0, T-F 9, 2nd M 8	P053	01/01/1990	12/31/9999
R055	2Wk: M-Th 9,F8,2nd M 0,F9	P055	01/01/1990	12/31/9999

Education (0022)

- The Education subtype indicates the type of education the employee has achieved.
- Fields to complete:
  - **Start**
  - **To**
  - **Education/training**
  - **Institute/location**
  - **Certificate**
- Use the Education infotype to document the details regarding education the employee has received.
- When finished, click **(Enter)** and then click **(Save)**.

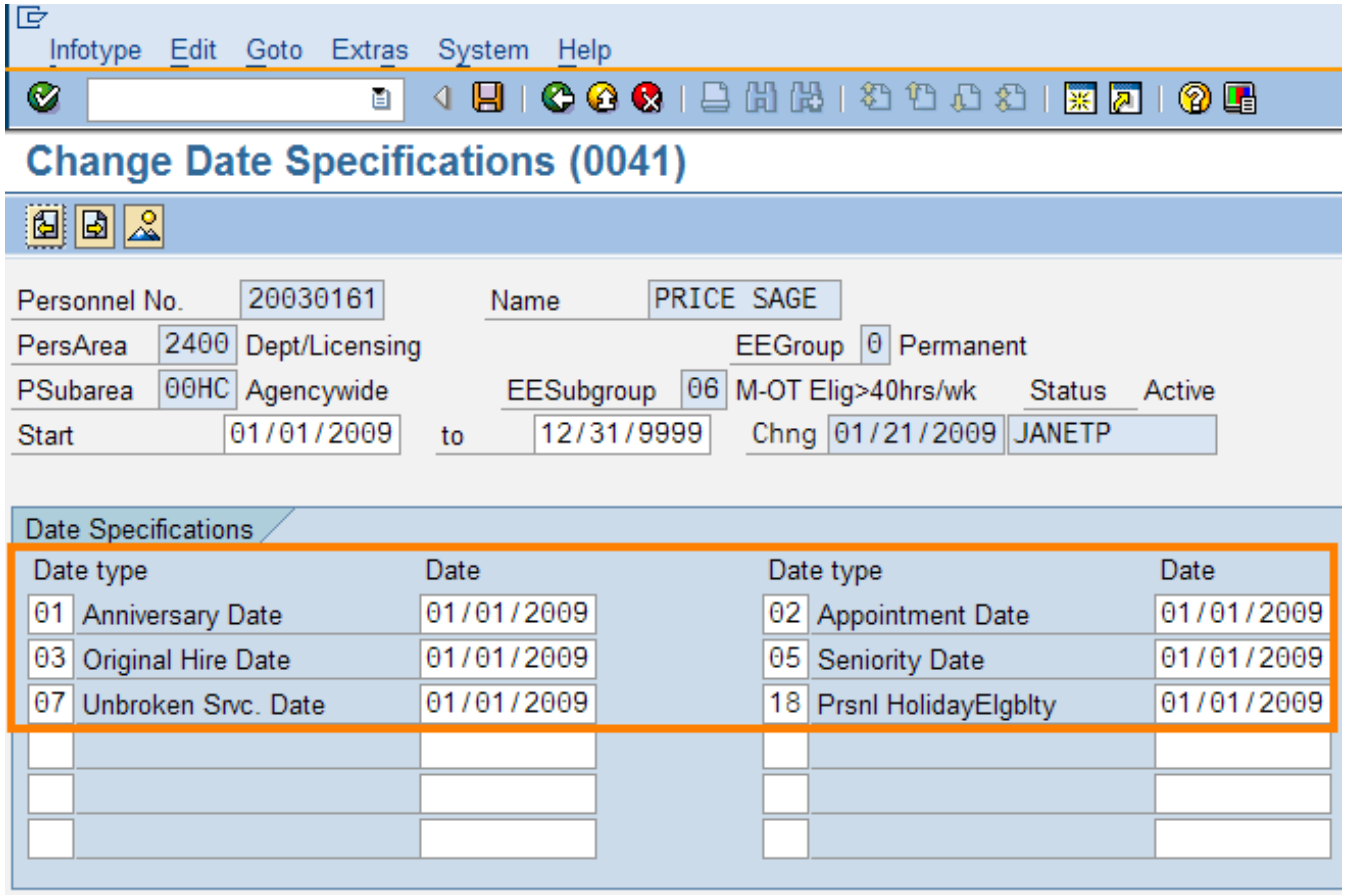
Note: To skip this infotype, click (**Close**) to move to the next infotype.





Date Specifications (0041) – cont'd

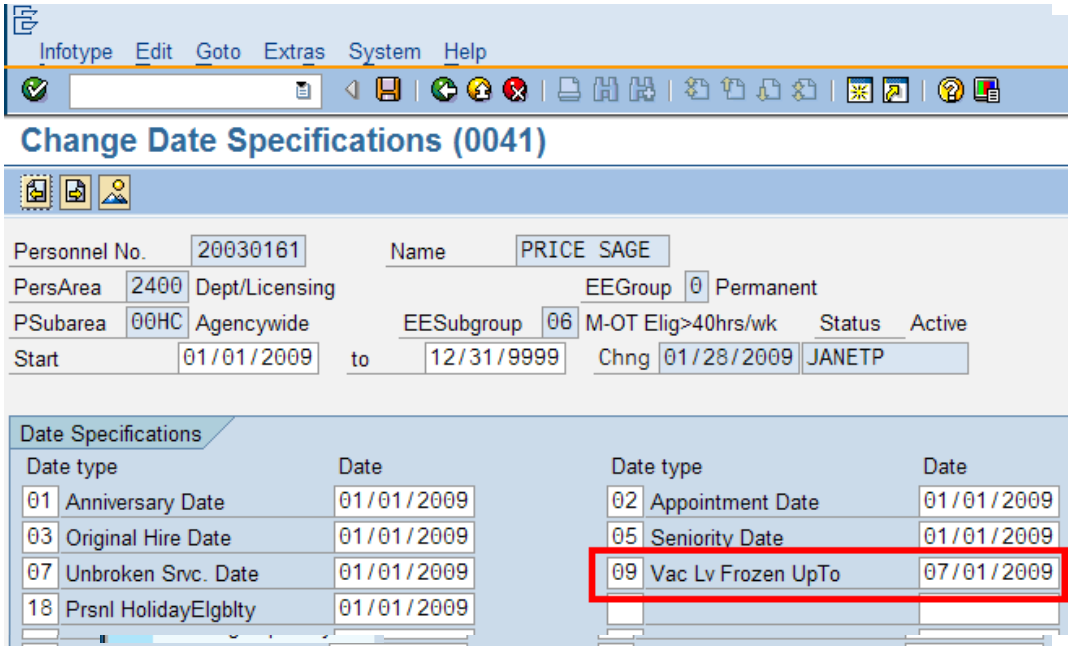
- The Date Specifications infotype documents important employee dates in employment history.
- Dates will default to the effective date of the New Hire.



Date Specifications **(0041)**

- HRMS allows up to 12 date types for each record.
- To add another Date type such as 09*Vac Lv Frozen Up To*

  1. Click the (**Matchcode**) in the next available Date type field to open selection list.
  2. Double-click to select.
  3. Enter date eligible.



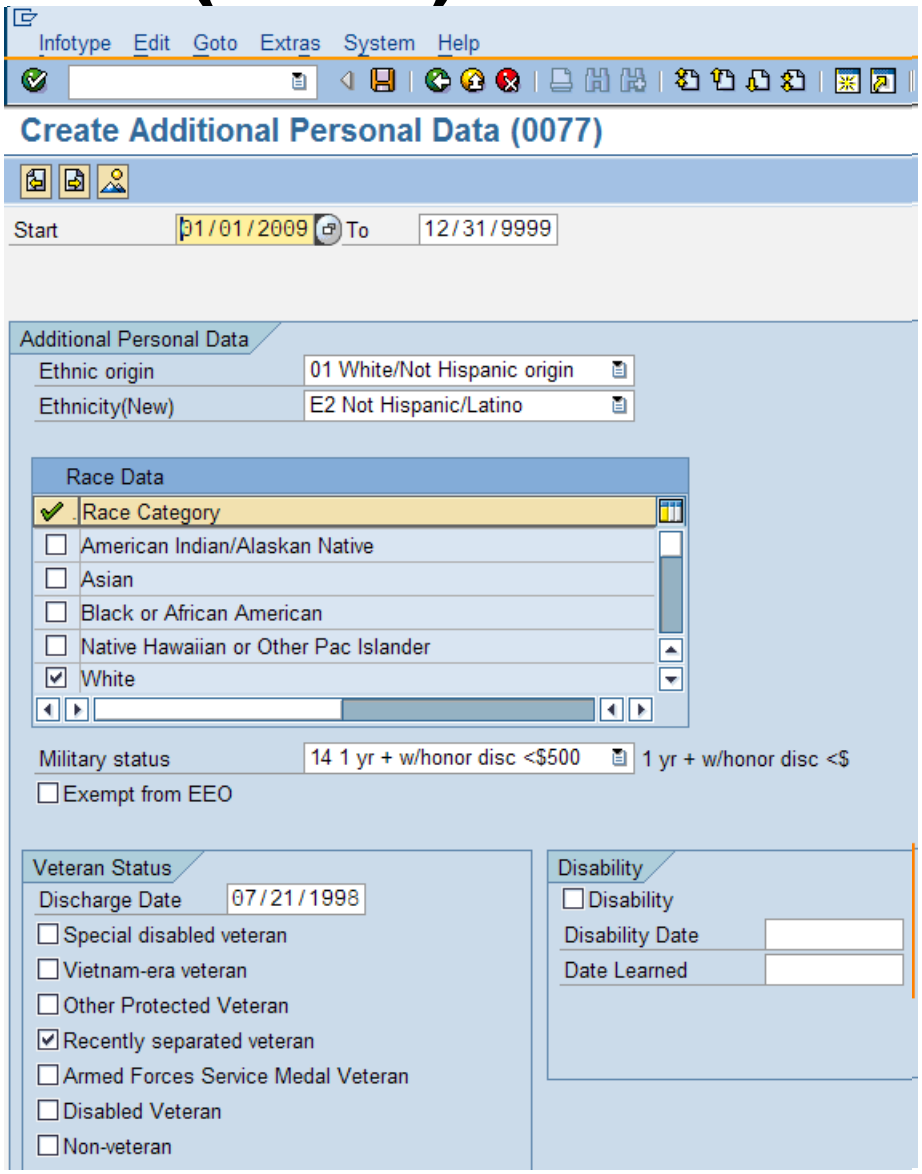
- When finished, click (**Enter**) and then click (**Save**).

Date Specifications – Adjusting Service Dates

- You can adjust the service dates for employees who have worked in other covered jurisdictions (if appropriate), higher education institutions or have served in the military.
  - Although these positions are not former appointments within State of Washington, the work period is recognized by the State for recording purposes.
- Adjusting service dates is important since layoffs are or will be governed by a combination of seniority and performance (as defined by each agency).

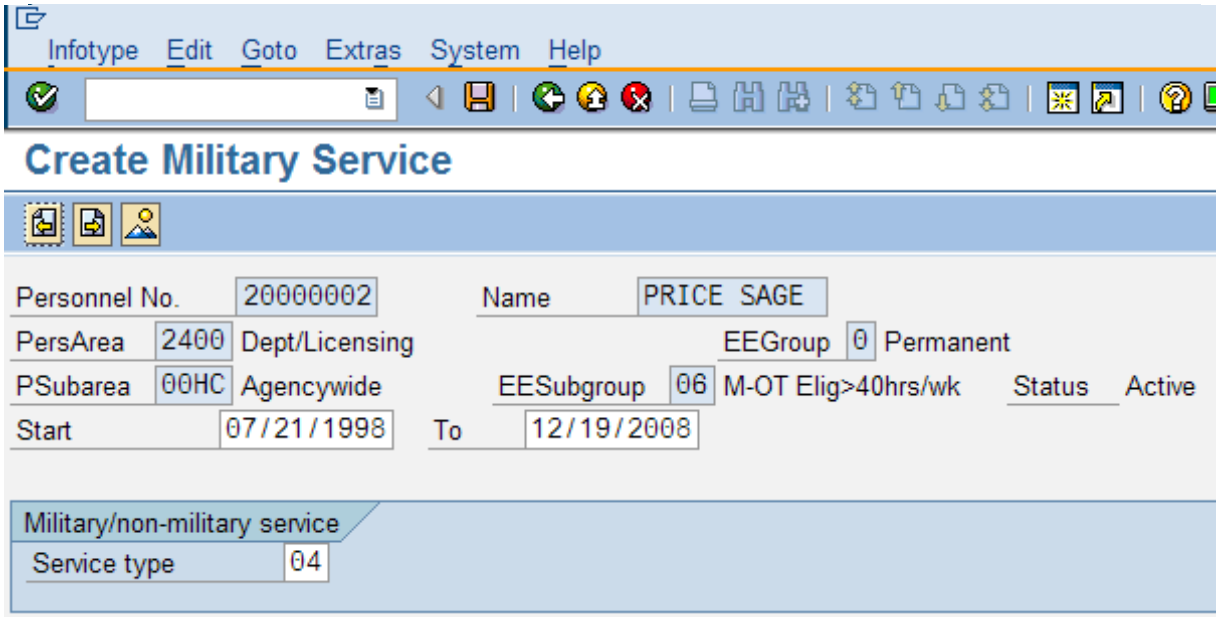
Additional Personal Data (0077)

- The Additional Personal Data infotype documents an employee's Equal Employment Opportunity (EEO) information.
- Fields to complete:
  - **Ethnic origin**
  - **Ethnicity (New)**
  - **Race Category**
  - **Military status**
  - **Veteran status**
  - **Disability**
- When finished, click **(Enter)** and then click **(Save)**.



Military Service (0081)

- The Military Service infotype tracks the branch of military service the employee participated in.
- Field to complete:
  - **Start / To**
  - **Service type**
    - 04 - US Air Force
- When finished, click **(Enter)** and then click **(Save).**

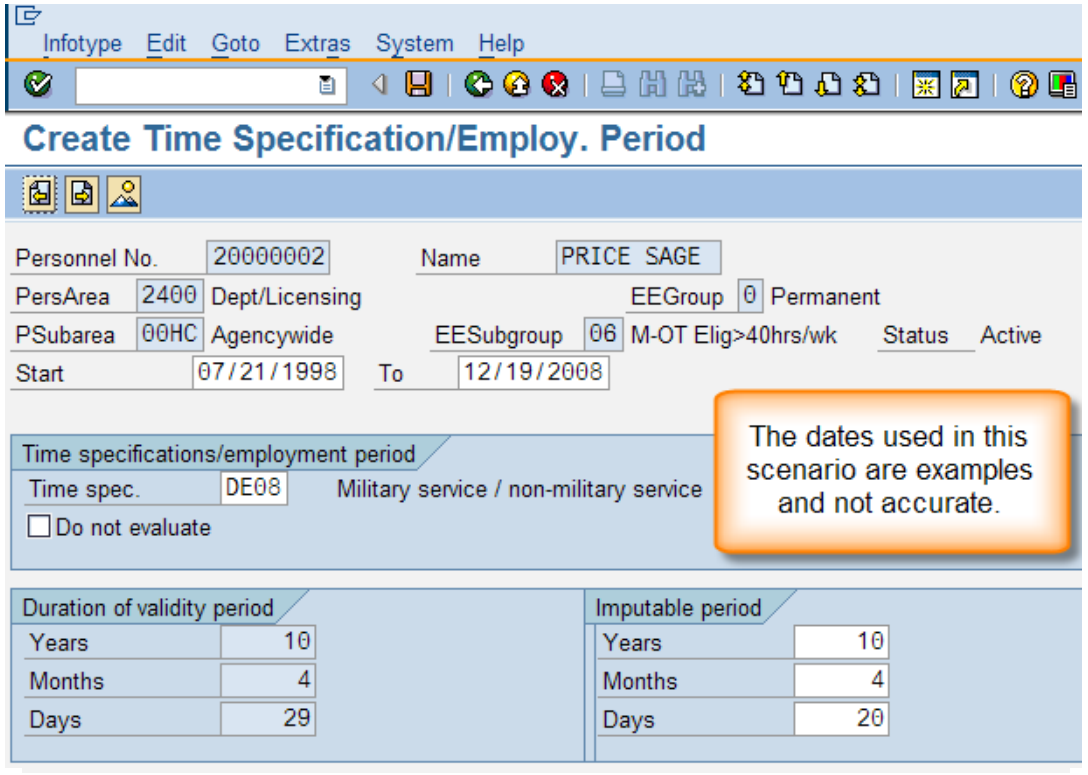


ST...	Name
01	United States Marine Corps
02	United States Navy
03	United States Army
04	United States Air Force
05	National Guard
06	Coast Guard

Note: The Start / To dates should reflect the employee's military service dates listed on the form DD 214.

Time Specifications / Employment Period (0552)

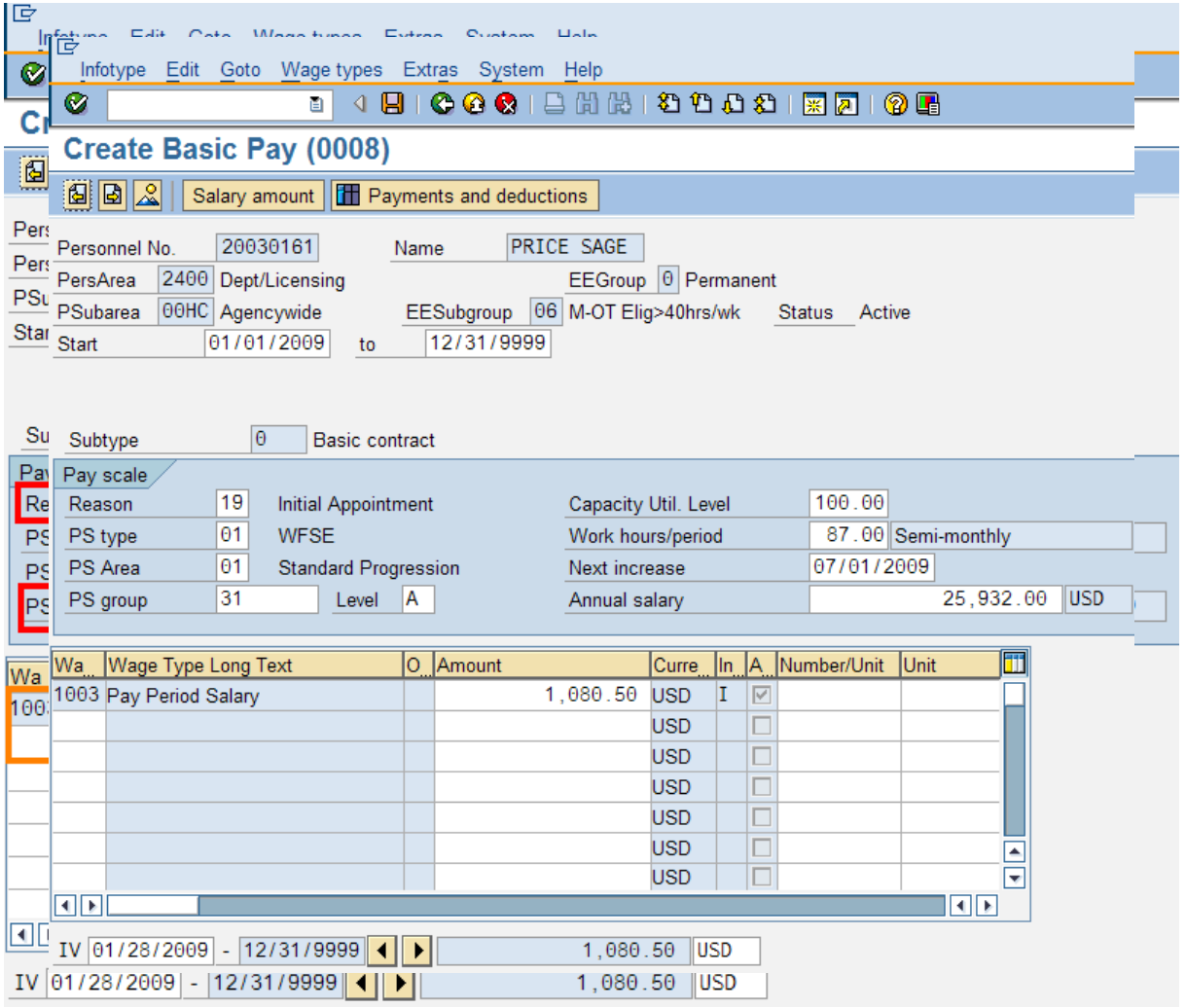
- The Time Specifications / Employment Period infotype tracks any military service dates and the resulting time spent in the service.
- Fields to complete:
  - **Start** (01/21/1999)
  - **To** (02/01/2002)
  - **Imputable period** (Years, Months, and Days)
- When finished, click **(Enter)** and then click **(Save)**.



Note: The Start / To dates should reflect the employee's military service dates listed on the form DD 214.

Basic Pay (IT0008)

- The Basic Pay infotype records pay scale and salary information for an employee.
- Fields to complete:
  - **Reason** – (19 Initial Appointment)
  - **Next Increase** – (optional)
  - **PS Level**
  - **Capacity utility level** (defaults in)
- When finished, click (Enter) and then click (Save).



Note:

New hires that start at the first step of their range receive their first PID at six months.

Agency HR processors must input the employee's first six month PID in the Next Increase field on the Basic Pay

Personnel Administration / Payroll Handoff

- At this point in the Hire action, the employee is created in HRMS and the system generates a Personnel Number, but the employee cannot be paid yet.
- You are responsible for following your agency procedures on completing the New Hire action beyond this point.
- The Payroll Processor or Benefits Processor is responsible for completing the following infotypes:
  - *Bank Details*
  - *Recurring Payments / Deductions*
  - *Create Unemployment State*
  - *Withholdings Info W4 / W5 US*
  - *Additional Withholding*
  - *Benefits Enrollment*

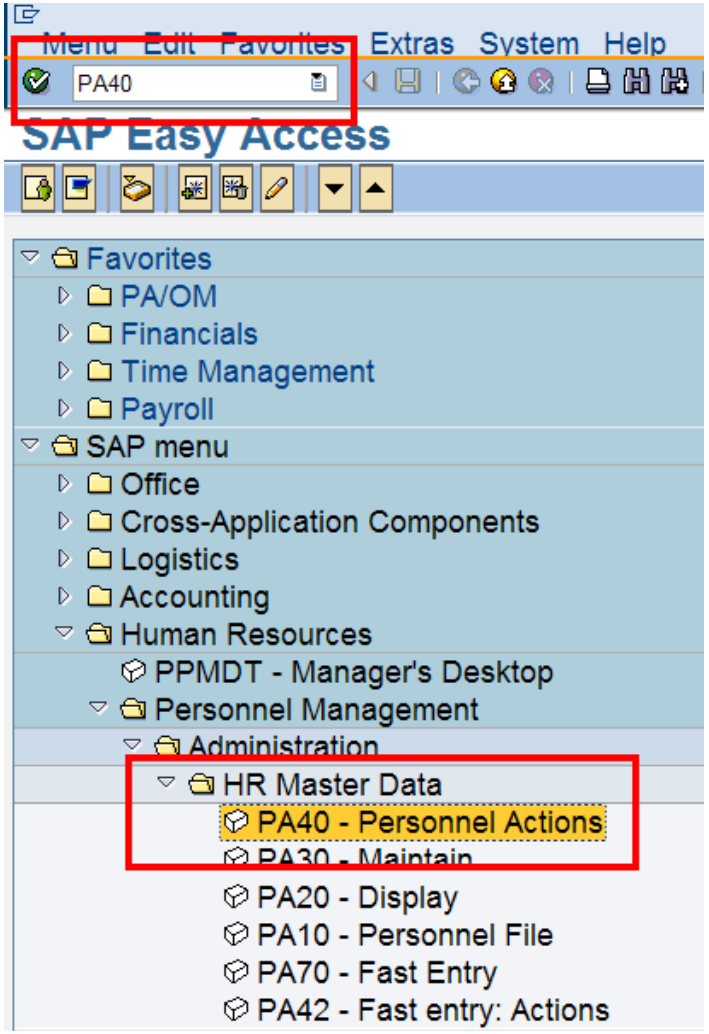
After saving *Basic Pay* (0008), HRMS will automatically return you to the ***Personnel Actions*** screen.

Restarting an Action

- During the New Hire, the Personnel Administration (PA) Processor may find themselves needing to stop in the middle of the Personnel Action transaction (PA40). In this case, the last infotype that was saved is where the PA Processor will continue.
  - This can be done when completing any of the Personnel Action such as the Rehire, Appointment, Separation, etc.
  - By restarting an action, it ensures that all infotypes are completed.

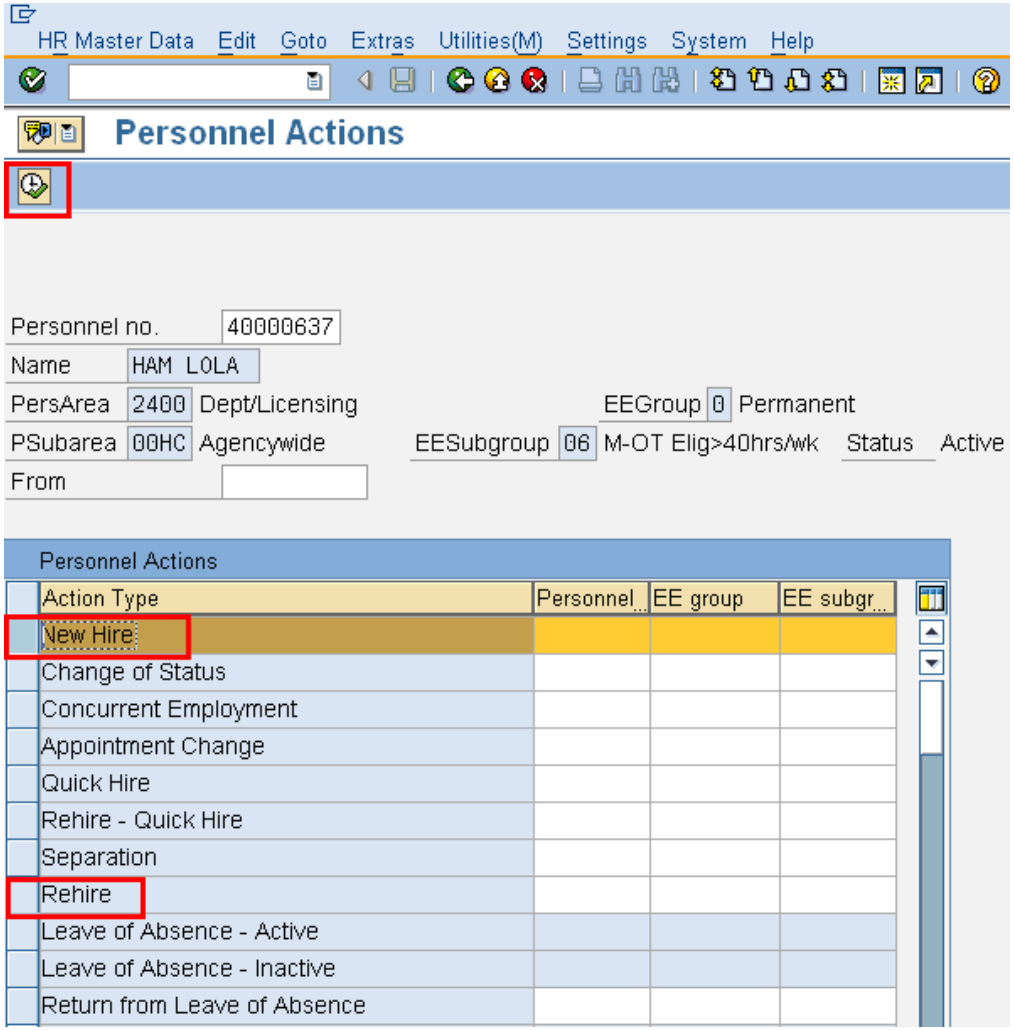
Restarting a Personnel Action

- To restart a Personnel action use the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field



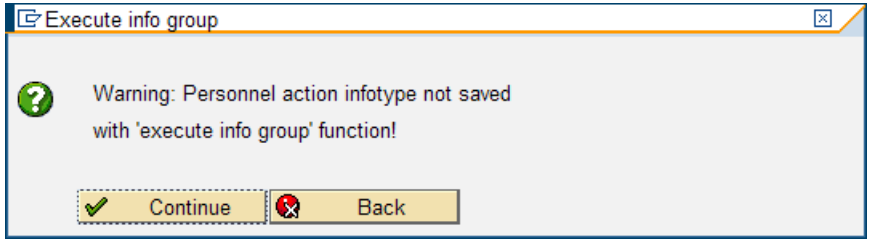
Accessing the New Hire/Rehire Action

- A personnel number is required to complete the New Hire or Rehire action.
- To access the action, click the box to the left of *New Hire* ***or*** *Rehire*.
- Click (**Execute**) to execute the action.



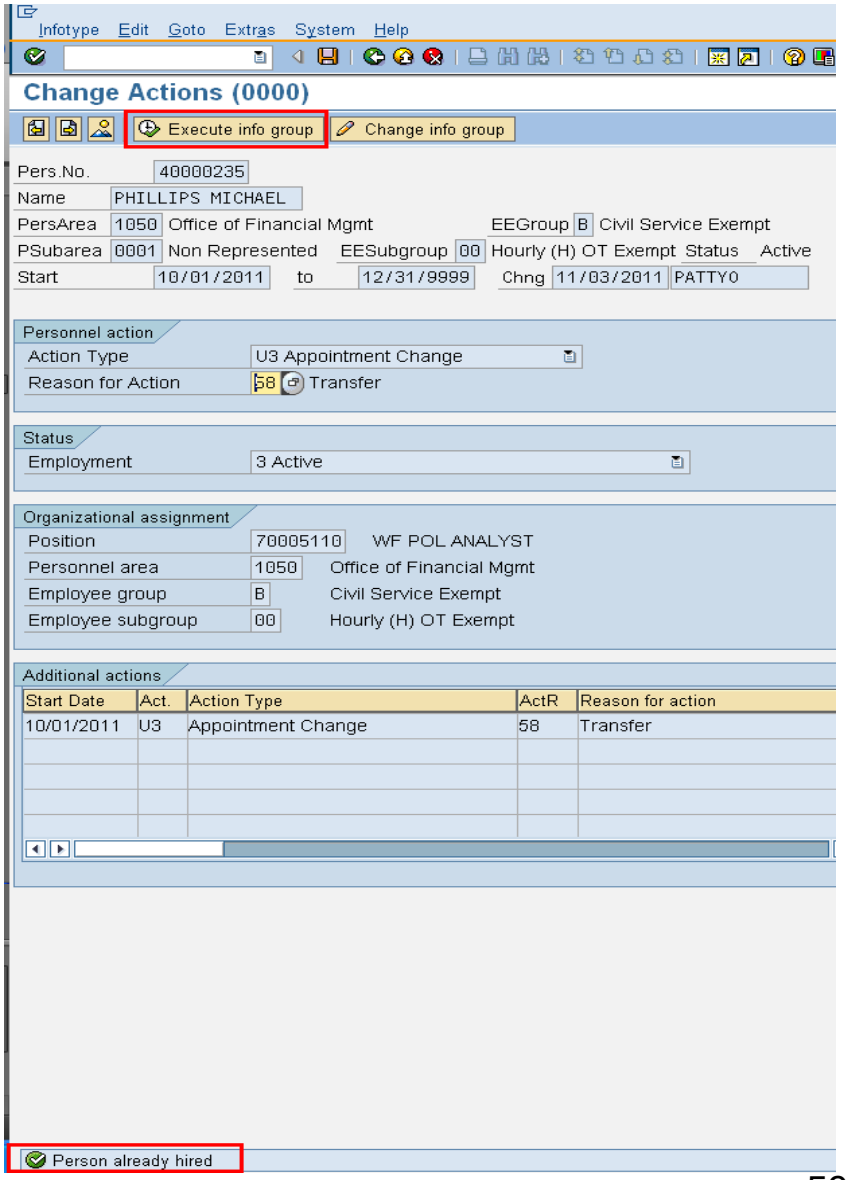
New Hire/Rehire action

- From *Actions* (0000) click Execute info group **(Execute info group)**
- The following warning message will appear:



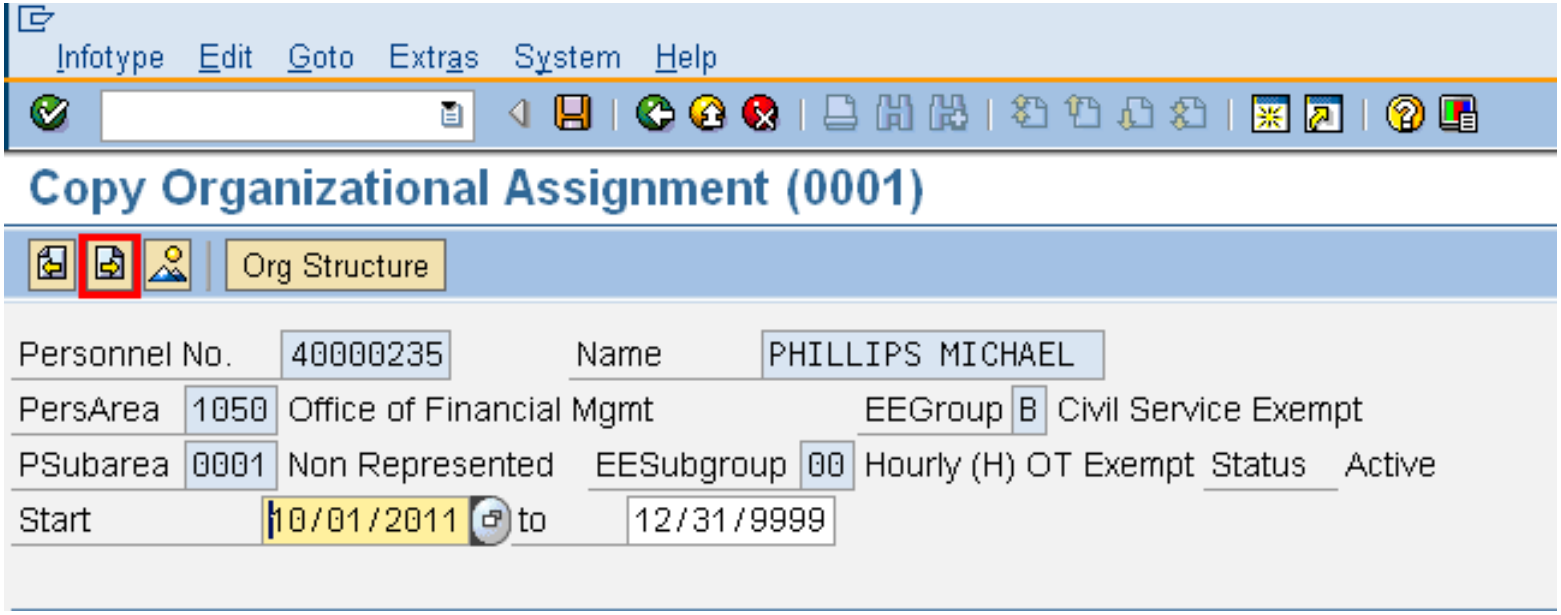
- Click Continue **(Continue)**

Note: Notice message on the status bar of 'Person already hired'.



New Hire/Rehire action

- As mentioned before, because the action has already been started you will begin from the last infotype saved.
- Once the Infotype Group is executed, you will have to click **(Next Record)** until you reach the appropriate infotype.



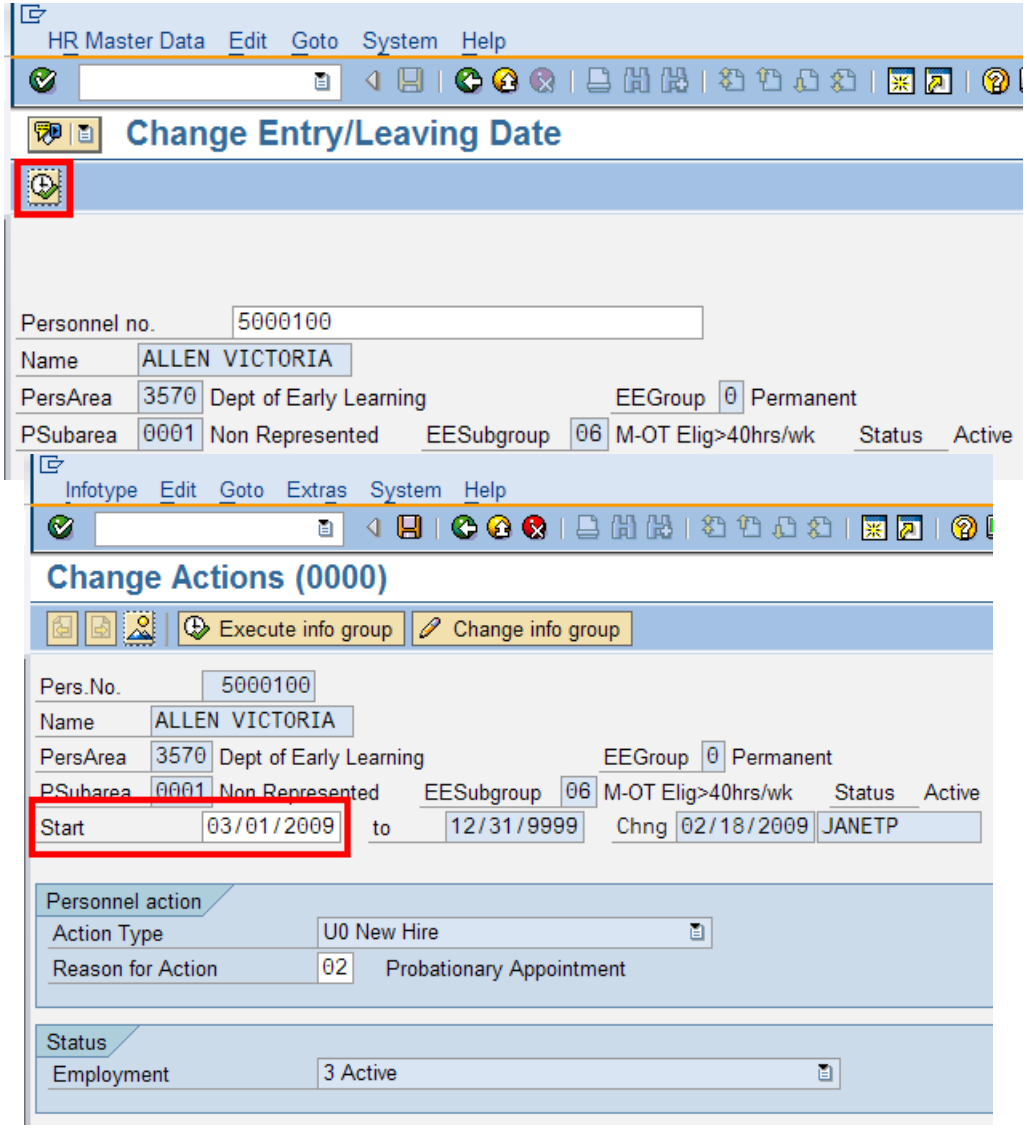
HRMS Activity

Hire an Employee

Change Entry Date

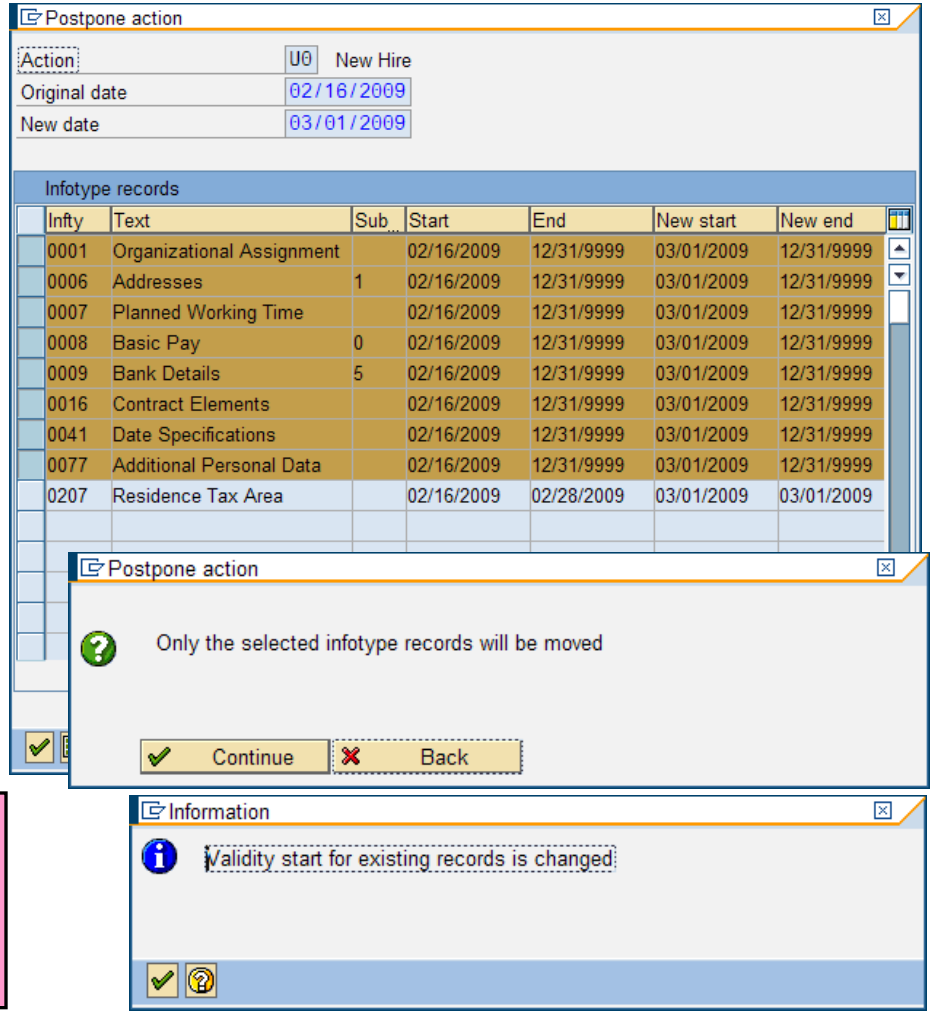
Change Entry Date– New Hire

- To change the employee's start date after the hire action has been completed **AND** payroll has not been processed, use the Change Entry/Leaving Date transaction **PA41**.
- From the Change Entry/Leaving Date screen, click (**Execute**).
- Enter new date in **Start** field, click (**Enter**) and then click (**Save**).



Change Entry Date – New Hire

- Select all infotypes that will need to be changed.
- Click **(Continue (Enter))**.
- Postpone action dialog will appear, click **(Continue)**.
- Information dialog will appear, click **(Continue)**.



See OLQR User Procedure, New Hire Action – Change Entry Date for more information.

Rehire

Rehire Overview

Upon completion of this section, you will be able to:

- Describe the difference between a Hire action and a Rehire action.
- Navigate through the Employee Rehire infotypes and understand the importance of the information in each infotype.
- Complete a Rehire action in HRMS.

Rehire an Employee

- Use the Rehire action for previous state employee **and** their Personnel Number exists in HRMS.
  - You have the ability to search for the employee in HRMS from the Personnel Actions screen (**PA40**).
- During the Rehire action, infotypes that were created from the previous appointment will have fields that are already completed. You will need to review and update these fields if necessary.
  - Example: The *Addresses* infotype (0006) will have the address from the employee's last appointment.

Rehire Infotypes

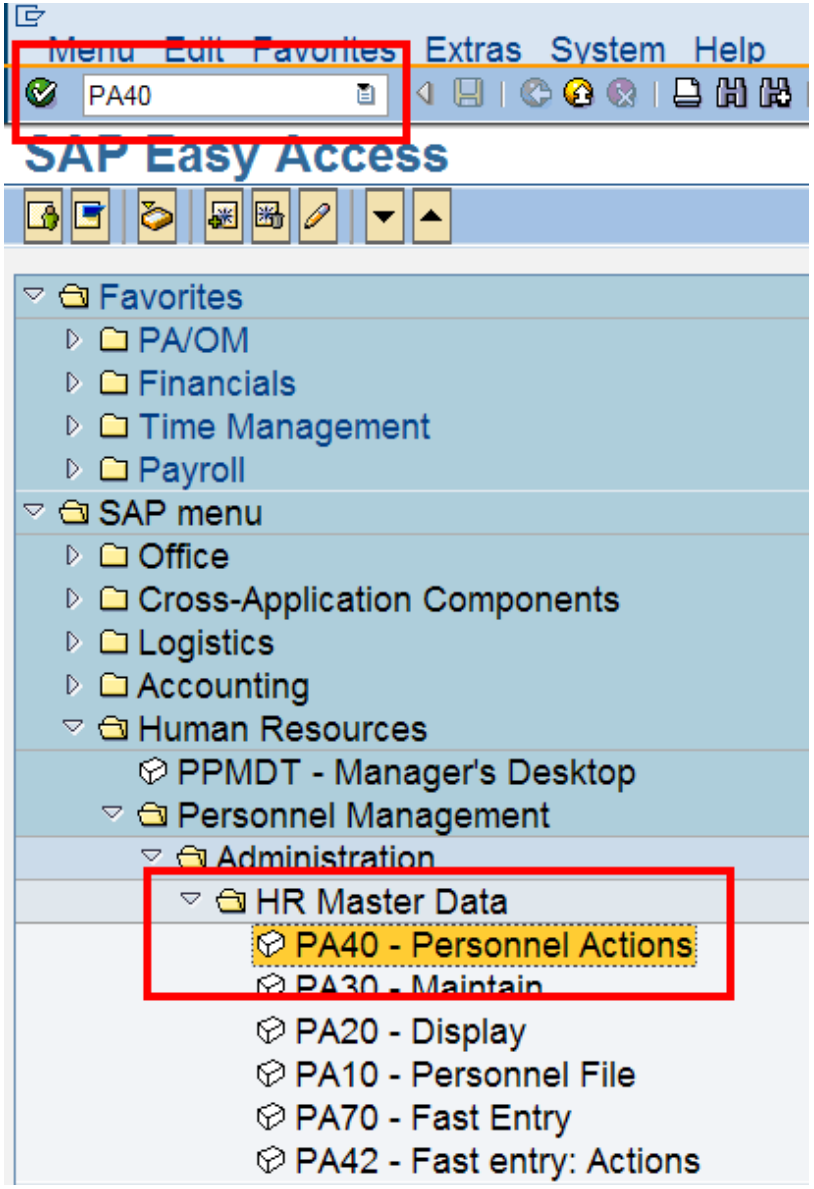
- Update the following infotypes during the Rehire action including:
  - Actions (0000)
  - Personal Data (0002)
  - Organizational Assignment (0001)
  - Contract Elements (0016)
  - Monitoring of Tasks (0019)
  - Addresses (0006)
  - Planned Working Time (0007)
  - Education (0022)
  - Date Specifications (0041)
  - Additional Personal Data (0077)
  - Basic Pay (0008)

Rehire from different Agency

- When rehiring an employee who was not previously employed at the your agency, you will need to perform the following to update the employee's organizational record to reflect your agency:
  - PA40/ PRNR/ REHIRE
  - Update the **Actions(0000)** and **Save**
    - Green check the delimit message to continue
  - Update the **Personnel Data (0002)** and **Save**
    - If no updates click **next record**
  - Update the **Organizational Assignment (0001)** and **Save**
  - Make selection of **Delimit Vacancy**
  - Close the sub-type for the Education Infotype
- Once you closed the Education Infotype, HRMS will kick you out of the **Rehire** Action
- You must **restart** the **Rehire Action** to complete the rehire.

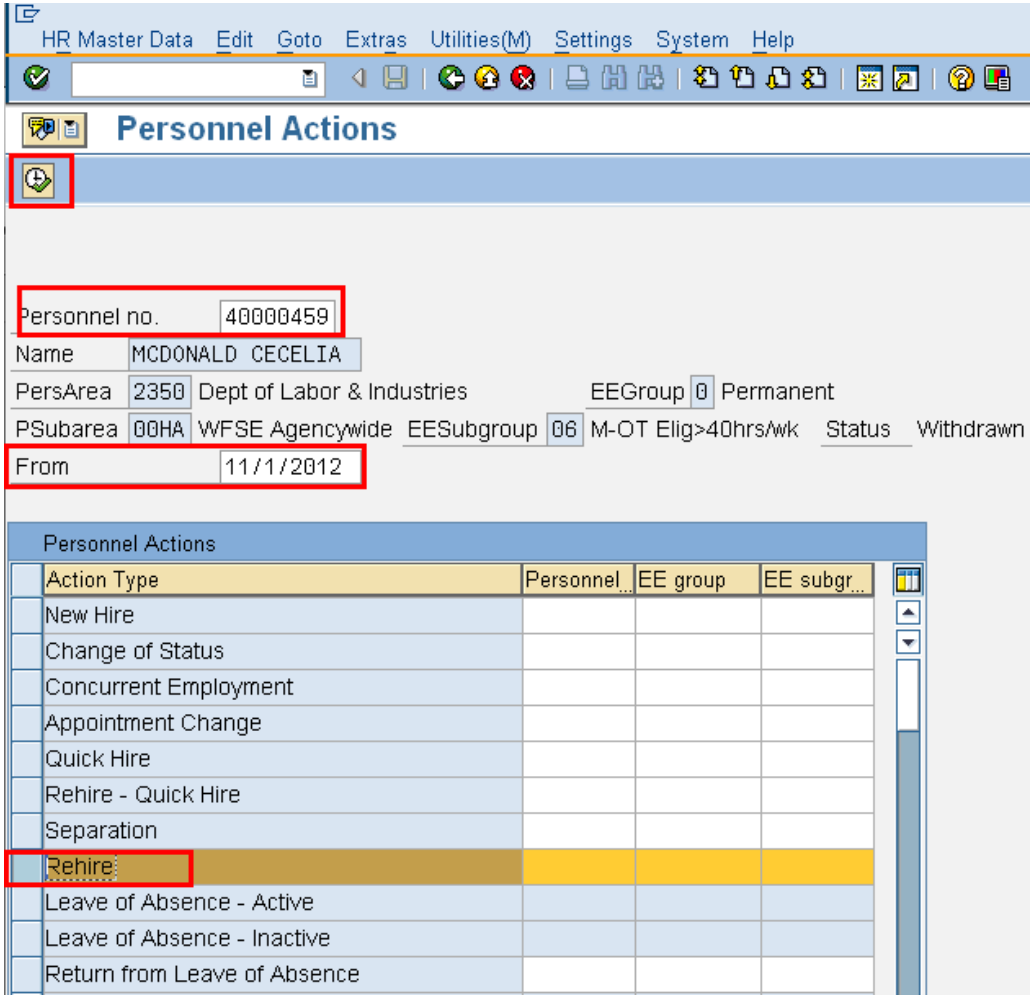
Rehire Action

- To create a Rehire Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field



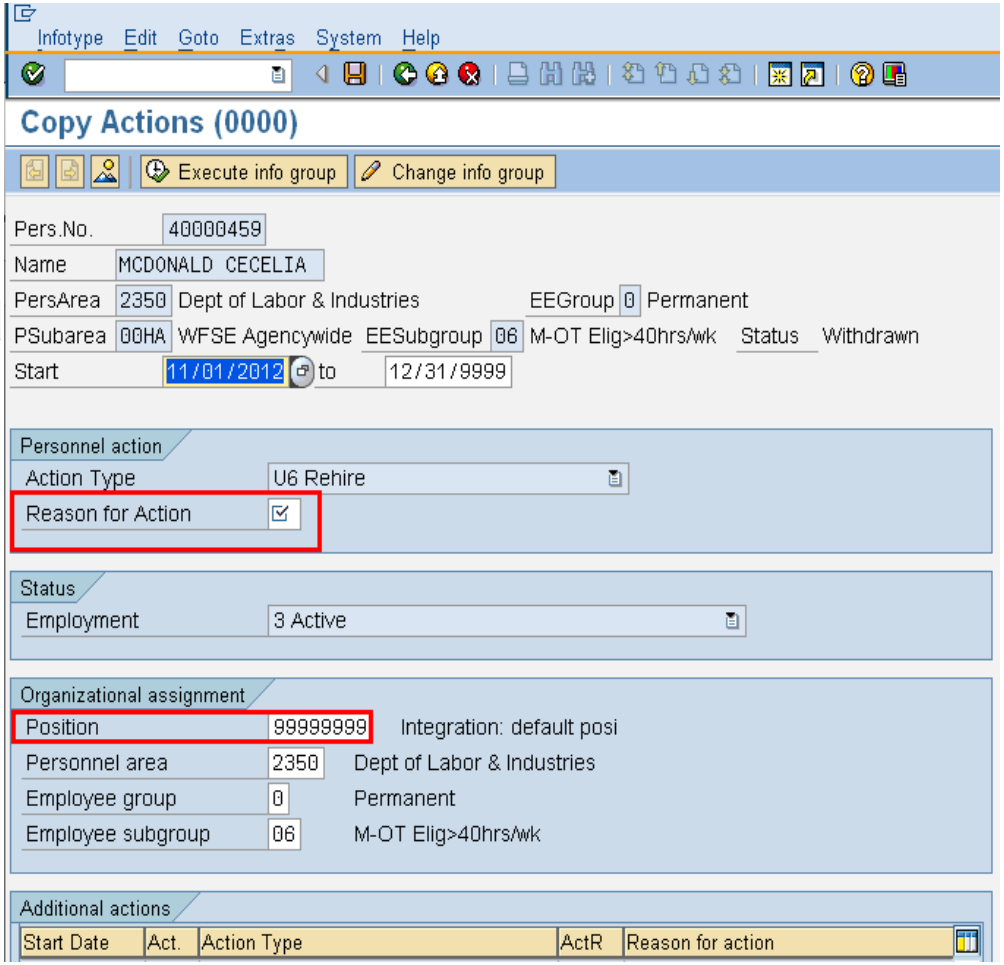
Rehire Personnel Action

- A Personnel Number is required to rehire an employee.
- Fields to complete:
  - **From** *(Date of Hire)*
  - **Personnel no**.
- To access the Rehire action, click the box to the left of *Rehire.*
- Then click (**Execute**).



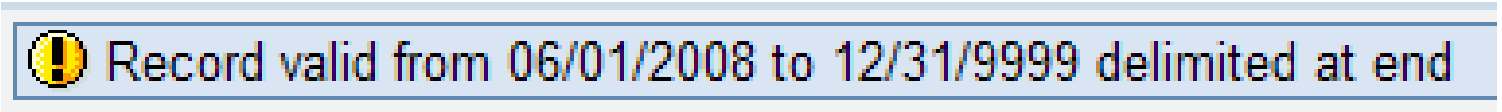
Actions **(0000)**

- Fields to complete:
  - **Reason for Action** (use matchcode)
  - **Position**
- Click **(Enter)** to validate and populate the following fields:
  - *Personnel Area*
  - *Employee Group*
  - *Employee Sub-group*
- When finished, click **(Enter)** and then click **(Save)**.

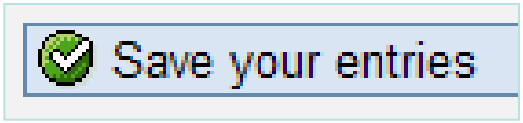


Delimit Message

- The delimit message will appear when validating the information entered on the infotype. The message reads **"Record valid from XX/XX/XXXX to XX/XX/XXXX delimited at end".**

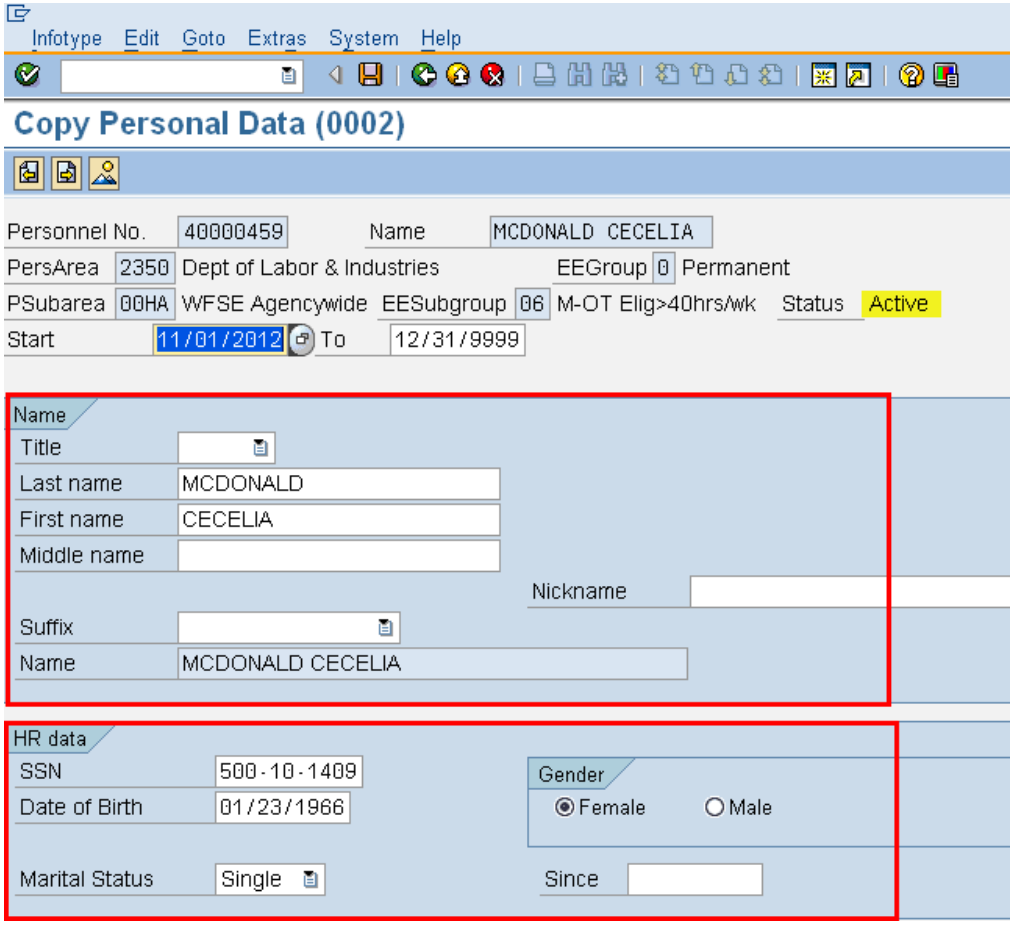


- Continue to **(Enter)** through message until the "Save Your Entries" prompt appears.



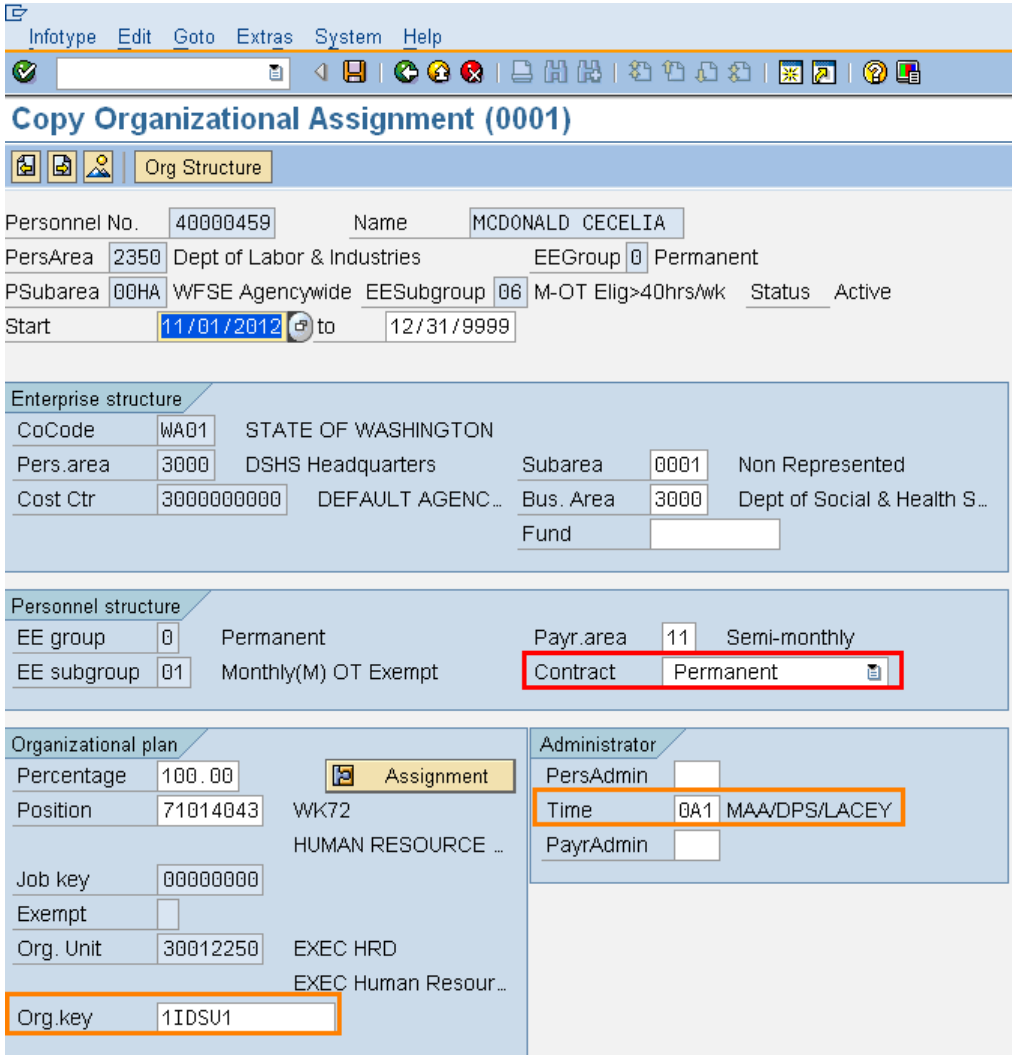
Personal Data **(0002)**

- For a rehire, verify and correct any data on this infotype.
- When finished, click **(Enter)** and then click **(Save)**. If information is correct, **do not save** and click **(Next Record)**.



Organizational Assignment (0001)

- Fields to complete:
  - **Contract**
    - 02 Probation
- Optional fields:
  - Org Key
  - Administrator (Time)
- When finished, click **(Enter)** and then click **(Save)**.



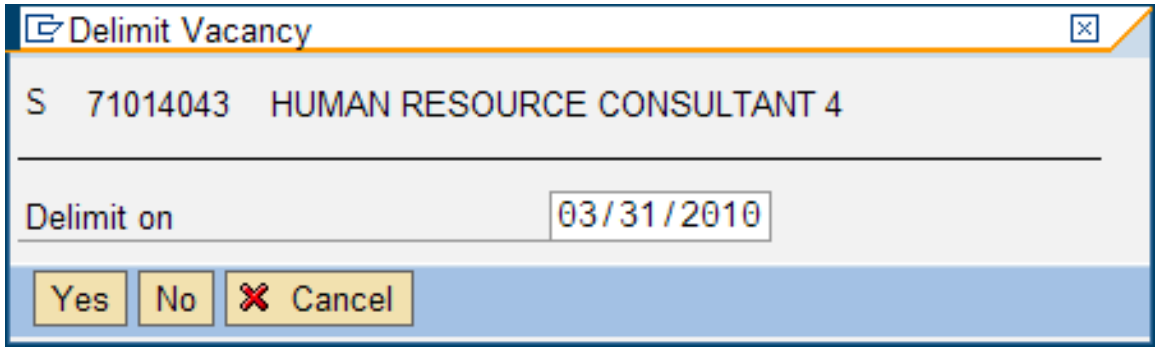
Delimit Vacancy

A feature used to report vacant positions. Information will be updated on the *Position Vacancy* infotype located in Organizational Management.

- This popup window will appear if the position is vacant or if multi-filled.

- Click ‘Yes’ to delimit the vacancy.
- Click ‘No’ to not delimit the vacancy.

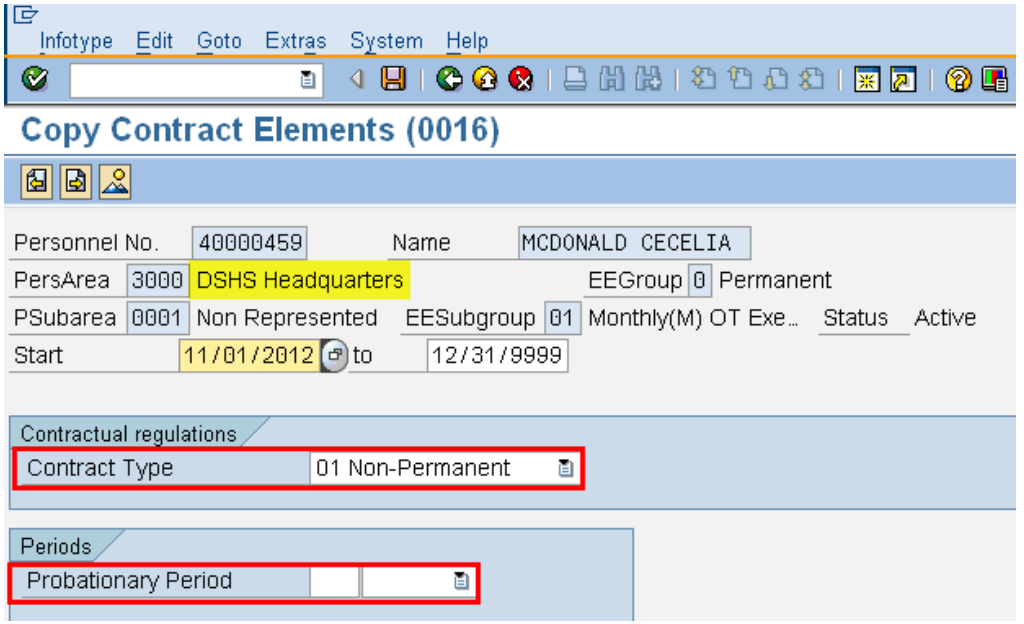
Note: If the position is multi-filled select ‘No’.



Contract Elements (0016)

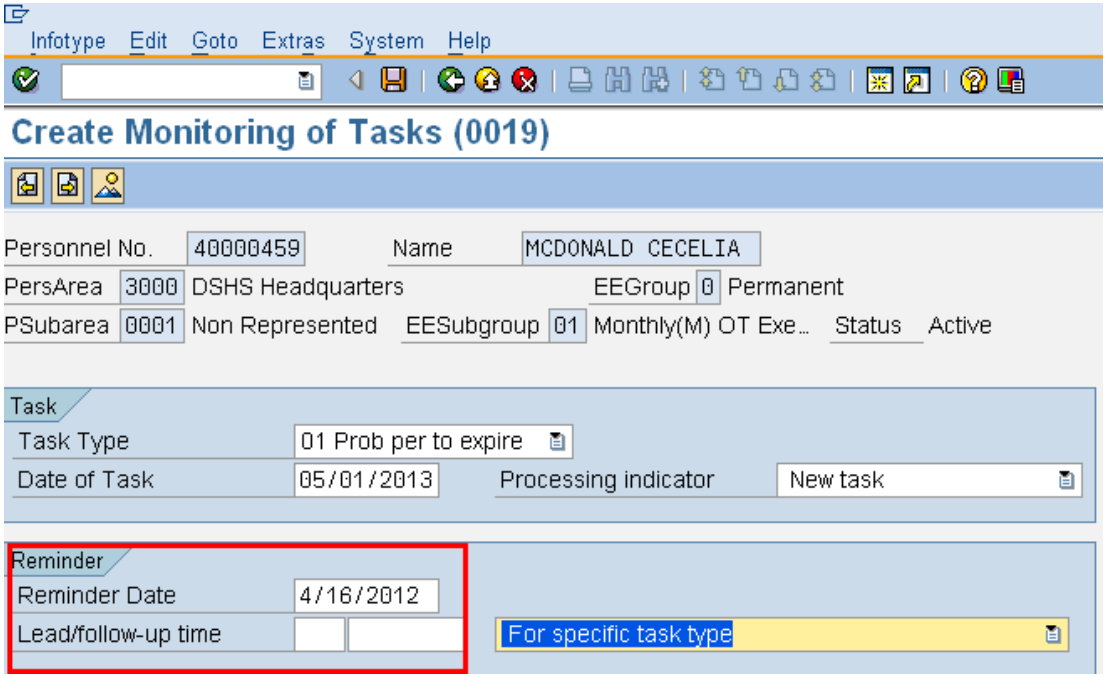
The *Contract Elements* infotype tracks an employee's state status (permanent or non-permanent).

- Fields required to complete:
  - **Contract type**
- Optional field
  - **Probationary period**
- When finished, click (**Enter**) and then click (**Save**).



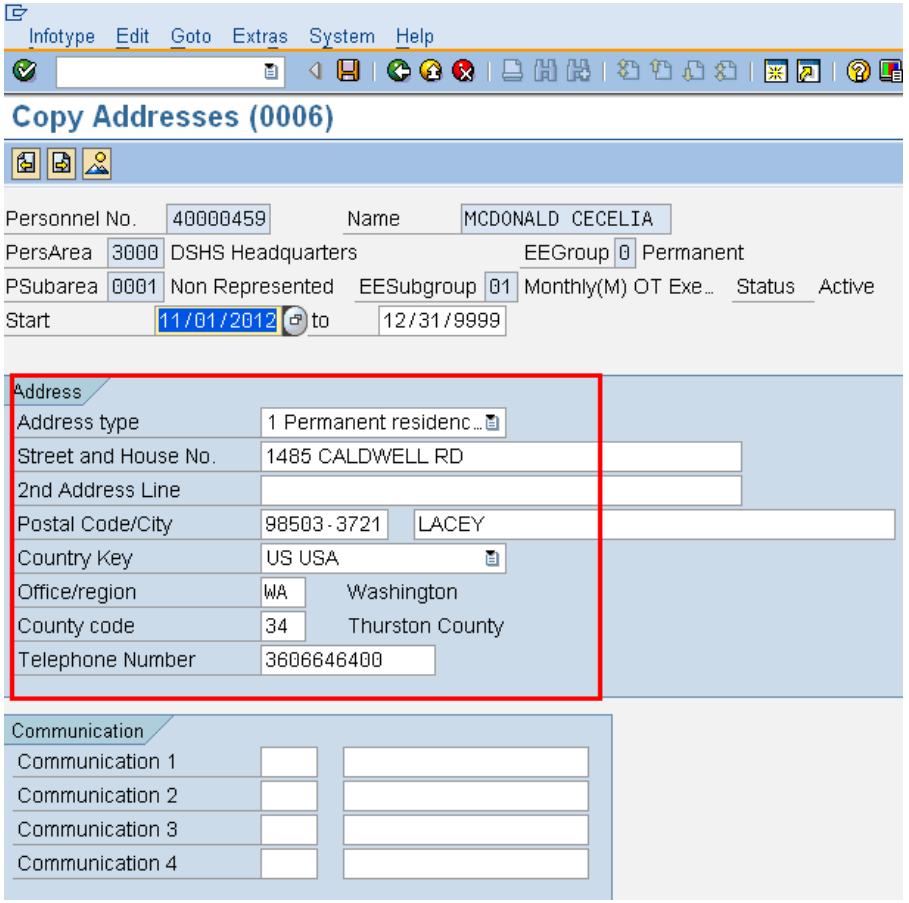
Monitoring of Task (0019)

- The *Monitoring of Tasks* infotype tracks the dates on which an employee moves from non-permanent status to permanent status.
- Fields to complete:
  - **Date of Task**
  - **Processing indicator**
  - **Reminder Date**
- When finished, click (**Enter**) and then click (**Save**).



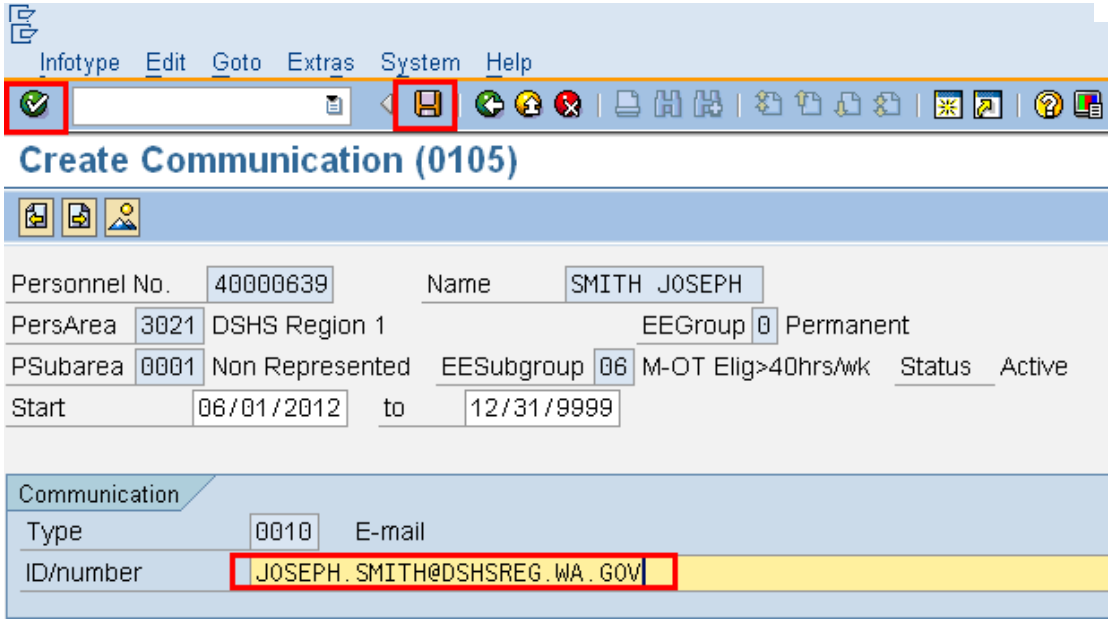
Addresses (0006)

- For a rehire, verify and update any data on this infotype.
- When finished, click **(Enter)** and then click **(Save)**.



Communications (0105)

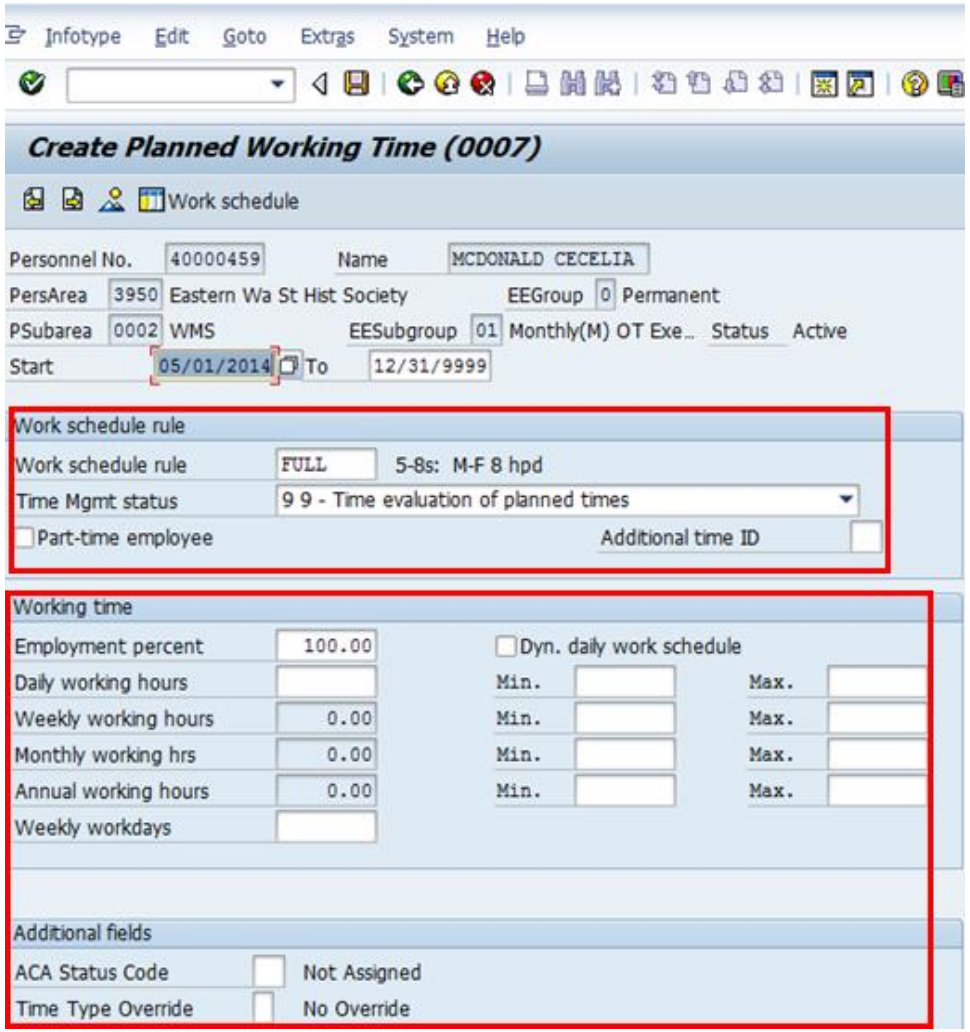
- The communications infotype is used to establish the employee's email address to be used.
- Field to complete:
  - **ID/number**
- When finished, click **(Enter)** and then click **(Save)**.



Note:
If you do not know the employee's email address at time of hire, click the **next** record button to move to next infotype.

Planned Working Time (0007)

- Fields to verify/complete:
  - **Work schedule rule**
    - Full – M-F 5-8s (Default)
  - **Time Mgmt status**
    - 9 9 Time evaluation of planned times (Default)
  - **Additional time ID**
    - Defaults to blank
  - **Employment percent** 100 (Default)
  - **ACA Status Code**
  - **Time Type Override***



- When finished, click **(Enter)** and then click **(Save)**.

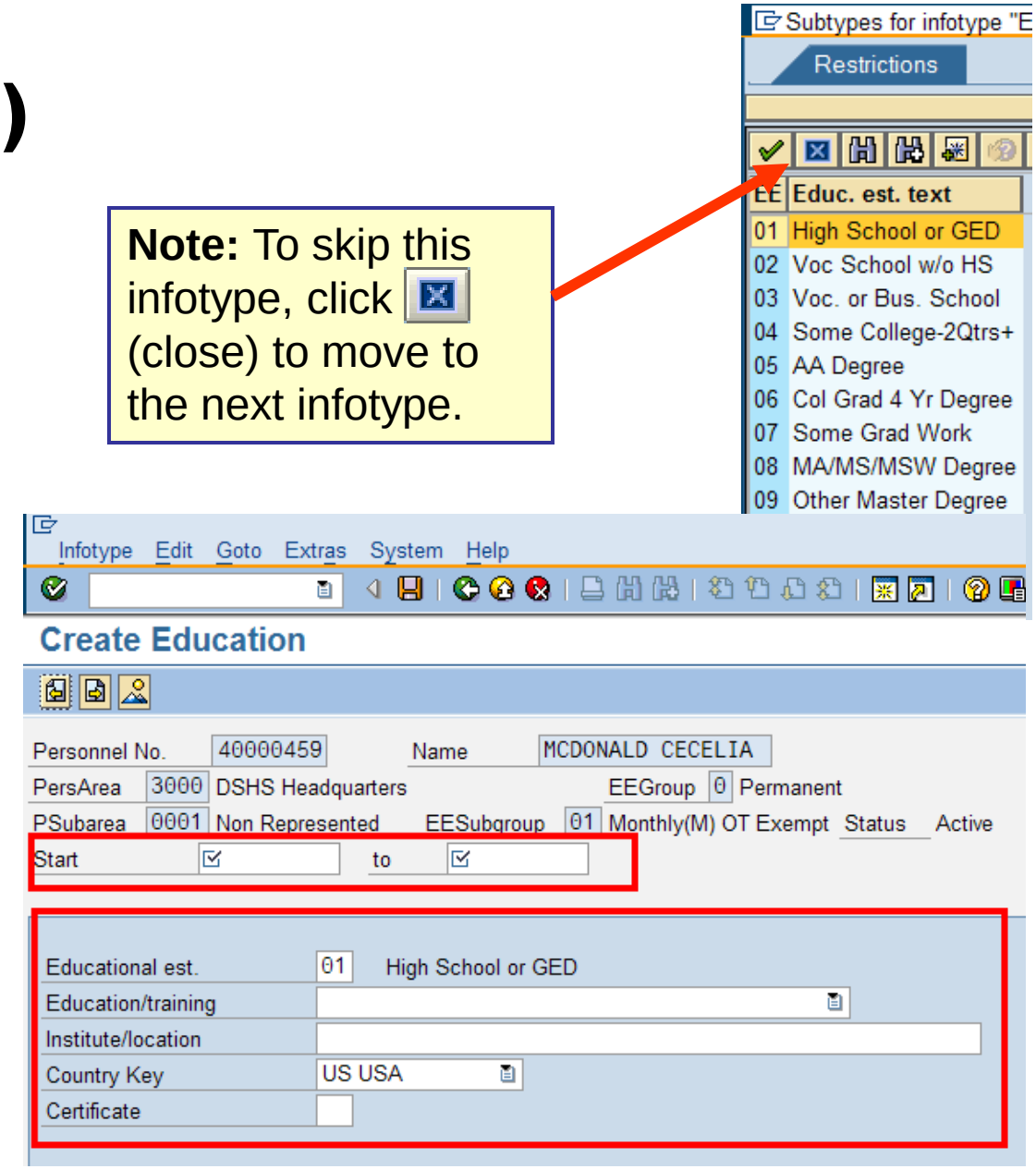
*** Note:**

The Time Type Override box is to only be used by agencies who intend to use TLA

Education (0022)

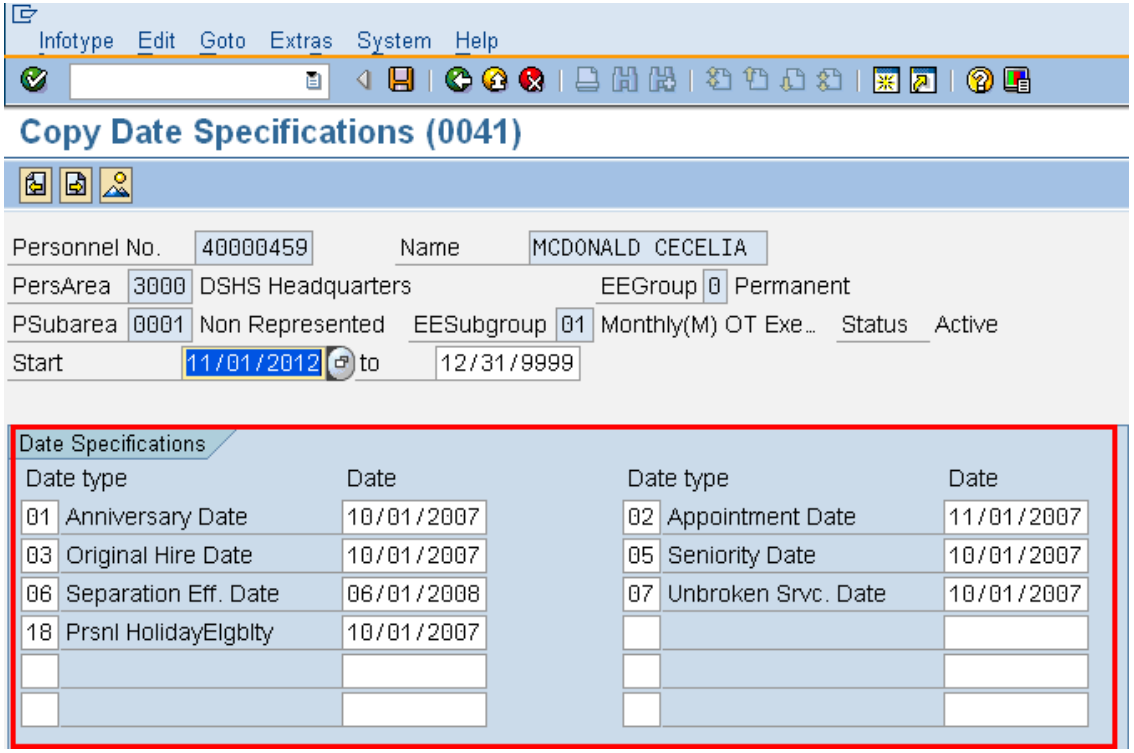
- Use the Education infotype to document the details regarding education the employee has received.
- When finished, click **(Enter)** and then click **(Save)**.

Note: To skip this infotype, click (close) to move to the next infotype.

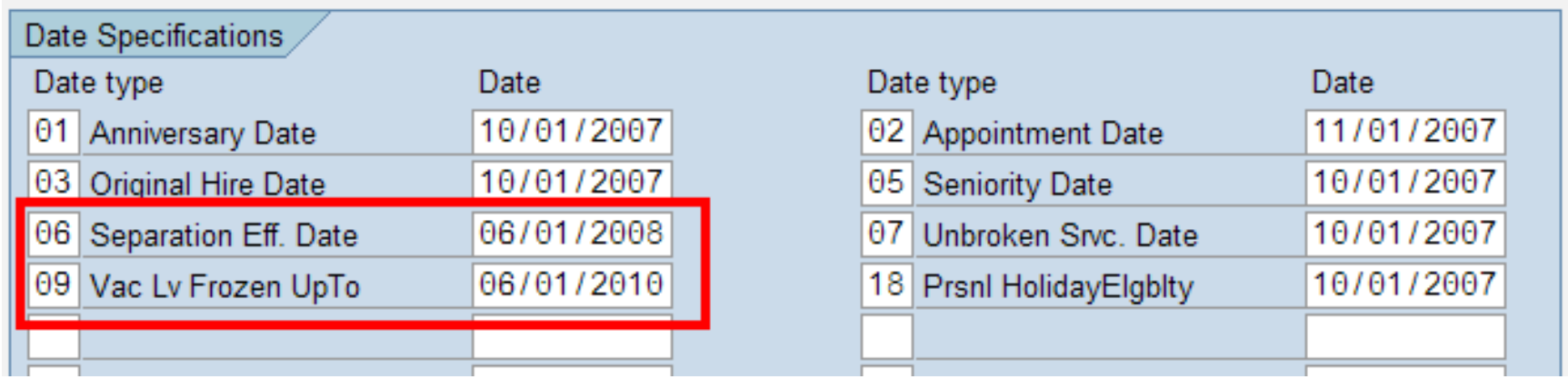


Date Specifications (0041)

- The Date Specifications infotype documents important dates in employment history.
- All previous dates will default and may need adjustments:
  - Anniversary Date
  - Appointment Date
  - Original Hire Date
  - Seniority Date
  - Unbroken Srvc. Date
  - Prsnl Holiday Eligibility



Date Specifications (0041) – cont'd



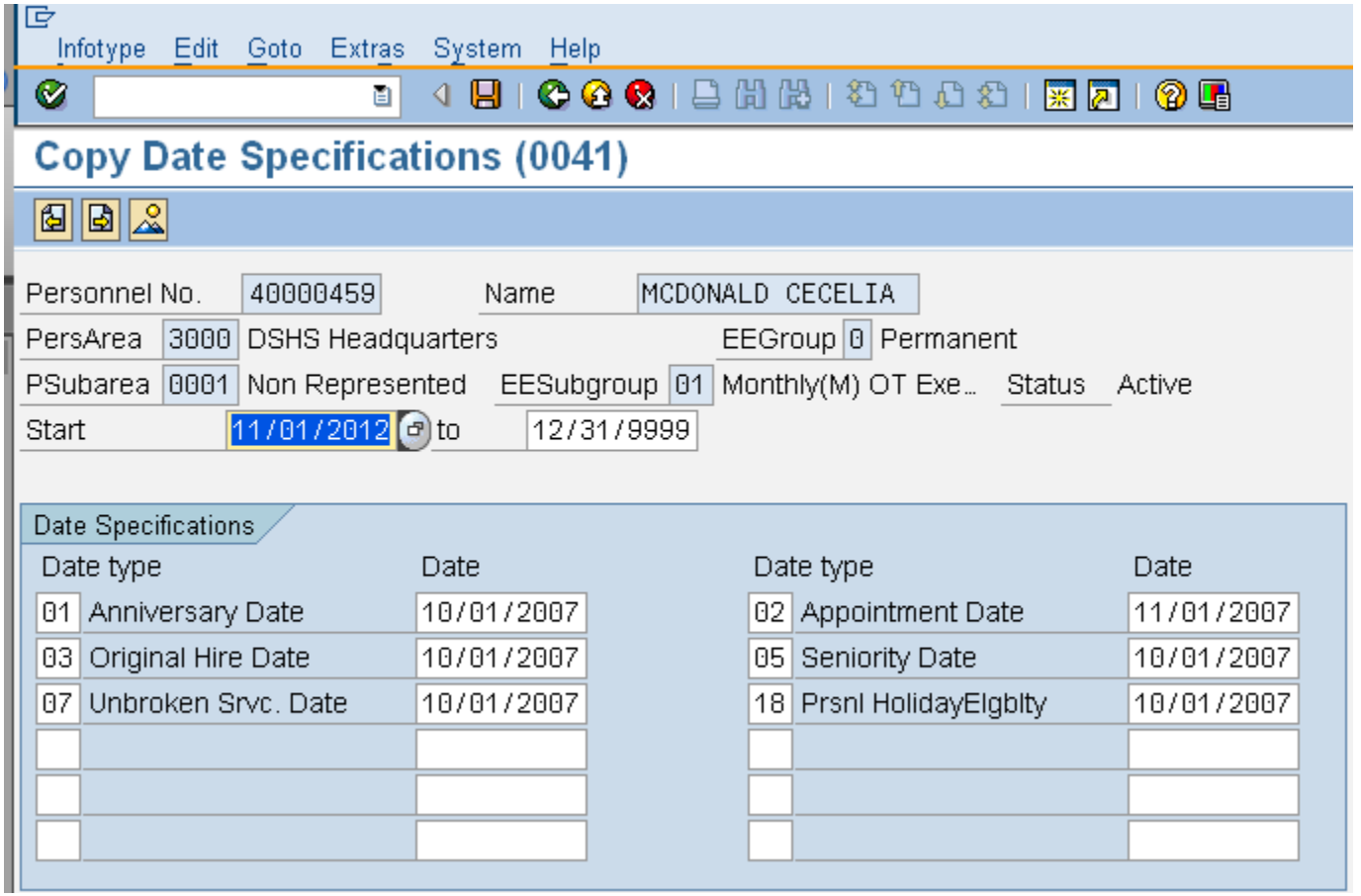
- If necessary, create the date type Vac Lv Frozen Up to.

1. Click the (matchcode) in the next available Date type field to open selection list.
2. Double-click to select.
3. Enter the date eligible.

Note: Remove the Separation Effective Date (Date Type 06).

Date Specifications (0041) – cont'd

- When finished, click **(Enter)** and then click **(Save)**.

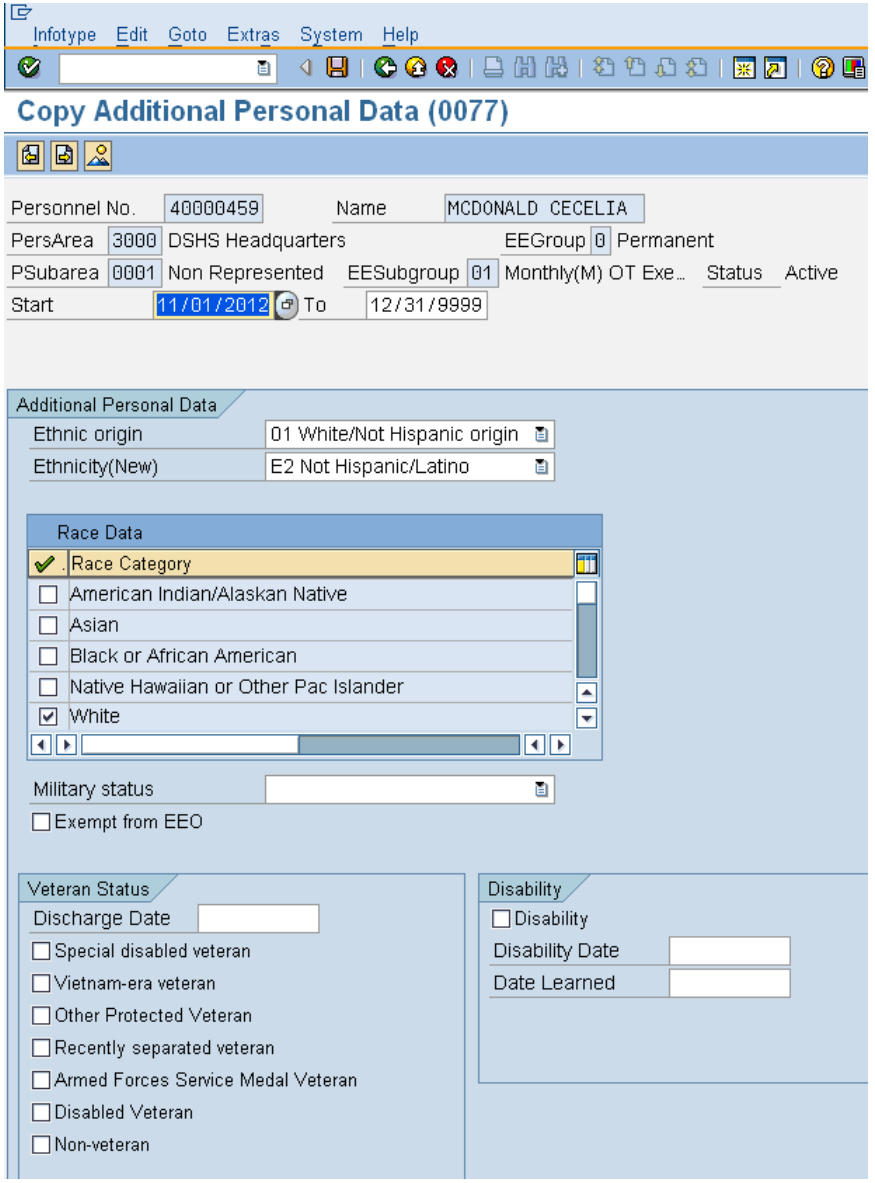


Adjusting Service Dates – Rehire

- When performing a Rehire action, adjust the service dates for an employee. This is not an automated process in HRMS and must be done manually.
- Updates are needed:
  - For retirement benefits for employees who have worked for other covered jurisdictions, higher education institutions, or have served in the military.
  - To accrue seniority for full-time employees based on seniority dates or union contracts.
  - To ensure accuracy of employee data when layoffs are needed.
- Before adjusting service dates, refer to WAC, Agency Policy, and CBA's for rules on updating date specifications.

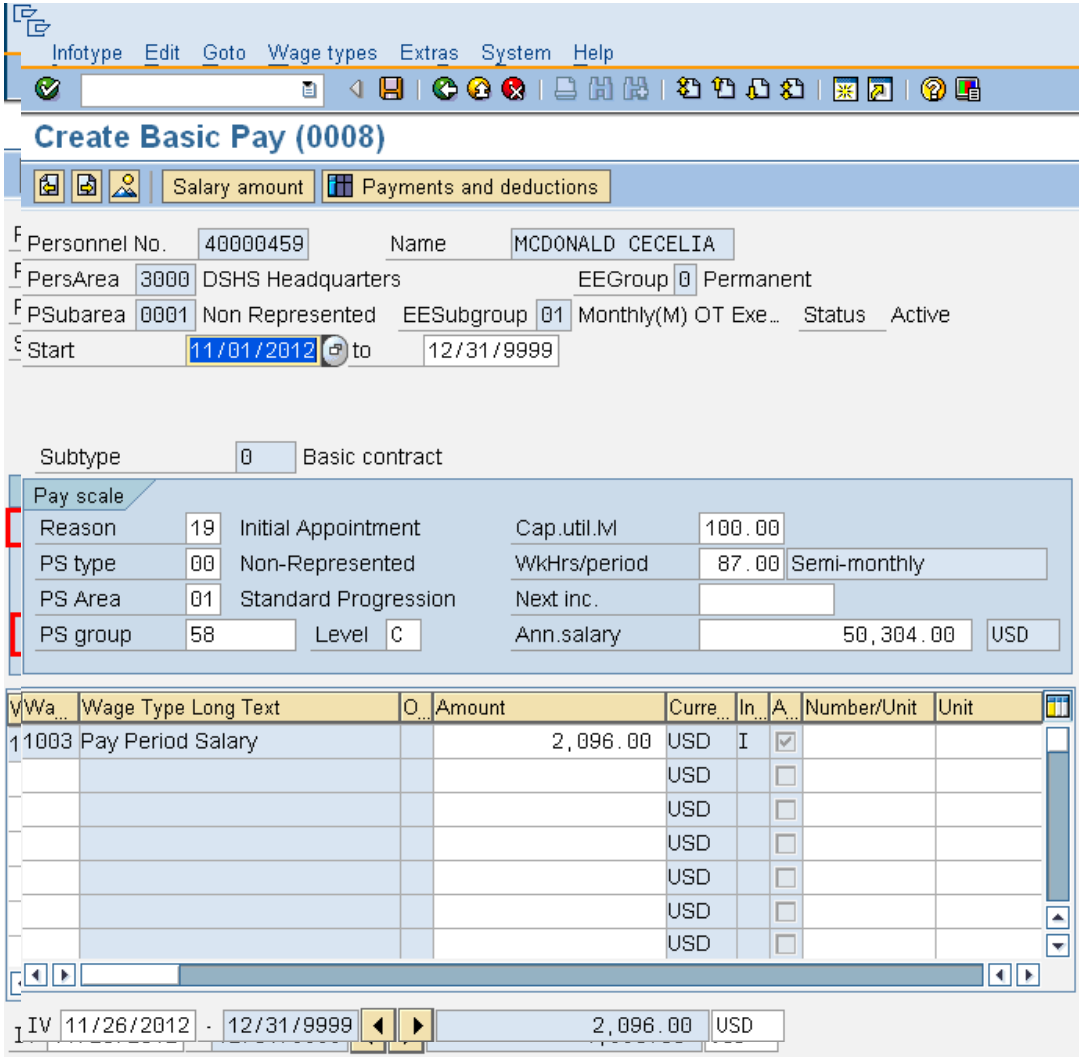
Additional Personal Data (0077)

- The Additional Personal Data infotype documents an employee's Equal Employment Opportunity (EEO) information.
- For a rehire, verify and correct any data on this infotype.
- When finished, click (Enter) and then click (Save). If information is correct, do not save and click (Next Record).



Basic Pay (IT0008)

- The *Basic Pay* infotype records pay scale and salary information for an employee.
- Fields to complete:
  - **Reason**
  - **Next Increase**
  - **PS Level**
  - **Capacity utility level** *(Defaults in)*
- When finished, click (**Enter**) and then click (**Save**).



Note: If the employee is eligible for a periodic increment (PID) or longevity step, and moves to a new Pay Scale Type, Pay Scale Area, Pay Scale Group or Pay Scale Level, the agency **HR Processors must** input the employee's current PID in the Next Increase field on the Basic Pay Infotype.

Personnel Administration / Payroll Handoff

- After all personnel updates are made to the employee's information, it is transferred to the Payroll Processor.

- The Payroll Processor records the following infotypes:
  - *Bank Details (0009)*
  - *Recurring Payments / Deductions (0014)*
  - *Withholding Info W4/W5 US (0210)*
  - *Additional Withholding Info Us (0234)*
  - *General Benefits Information (0171)*

HRMS Activity

Rehire an Employee

Review Questions

- **What is the difference between a new hire and a rehire?**

- **True or False – During the Rehire action, it is necessary to re-create all employee infotypes in HRMS?**

Change of Status

Change of Status Overview

Upon completion of this section you will be able to:

- Define the key terms and concepts associated with the Change of Status action.
- Navigate through the Change of Status infotypes and understand the importance of the information in each infotype.
- Review a Change of Status action.

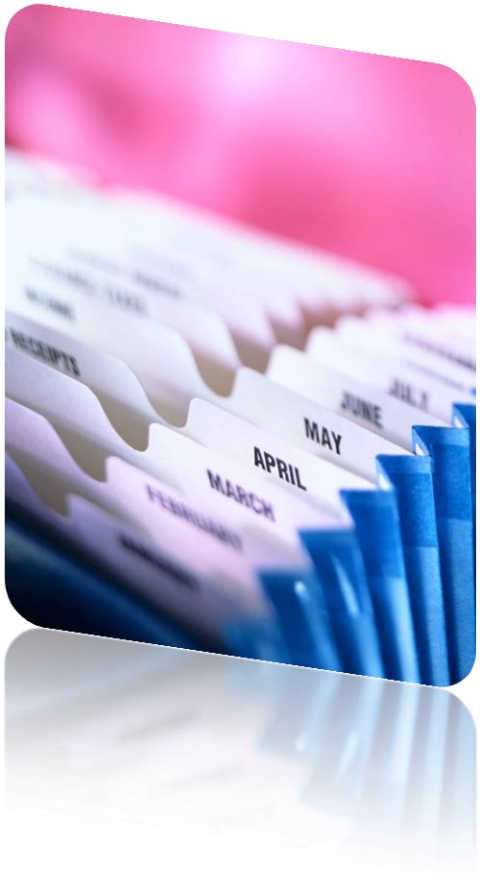
Change of Status

A **Change of Status** occurs when an employee has reach the end of their probationary appointment or has completed their in-training appointment.

- End of Probationary Appointment
  - When an employee reaches the end of their probationary period, their status is changed to ‘permanent’.
- Completion of In-training Appointment
  - When an employee completes their In-training Probationary Appointment at a lower job class level, their status is changed to ‘trial service’.
    - In-training appointments may consist of multi-levels in which the status would be changed to ‘In-training/Trial Service’.

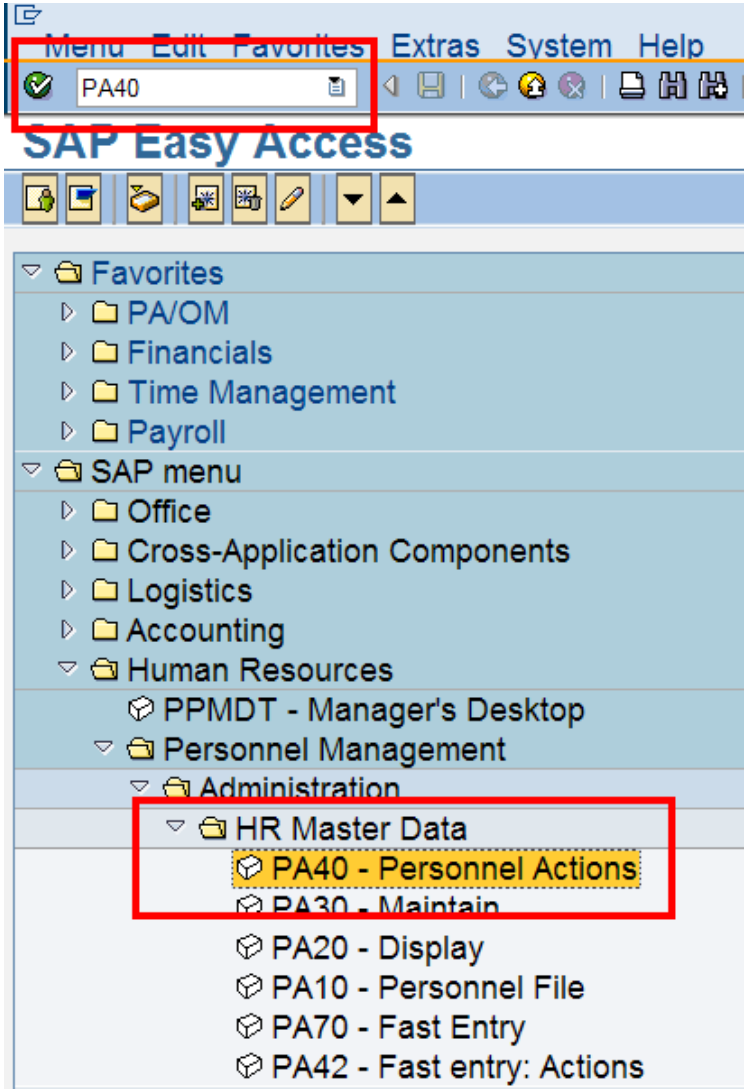
Change of Status Infotypes

- Update the following infotypes during the Change of Status action:
  - *Actions* (0000)
  - *Organizational Assignment* (0001)
  - *Contract Elements* (0016)
- Use **PA30** to maintain the following infotype:
  - *Monitoring of Task* (0019)



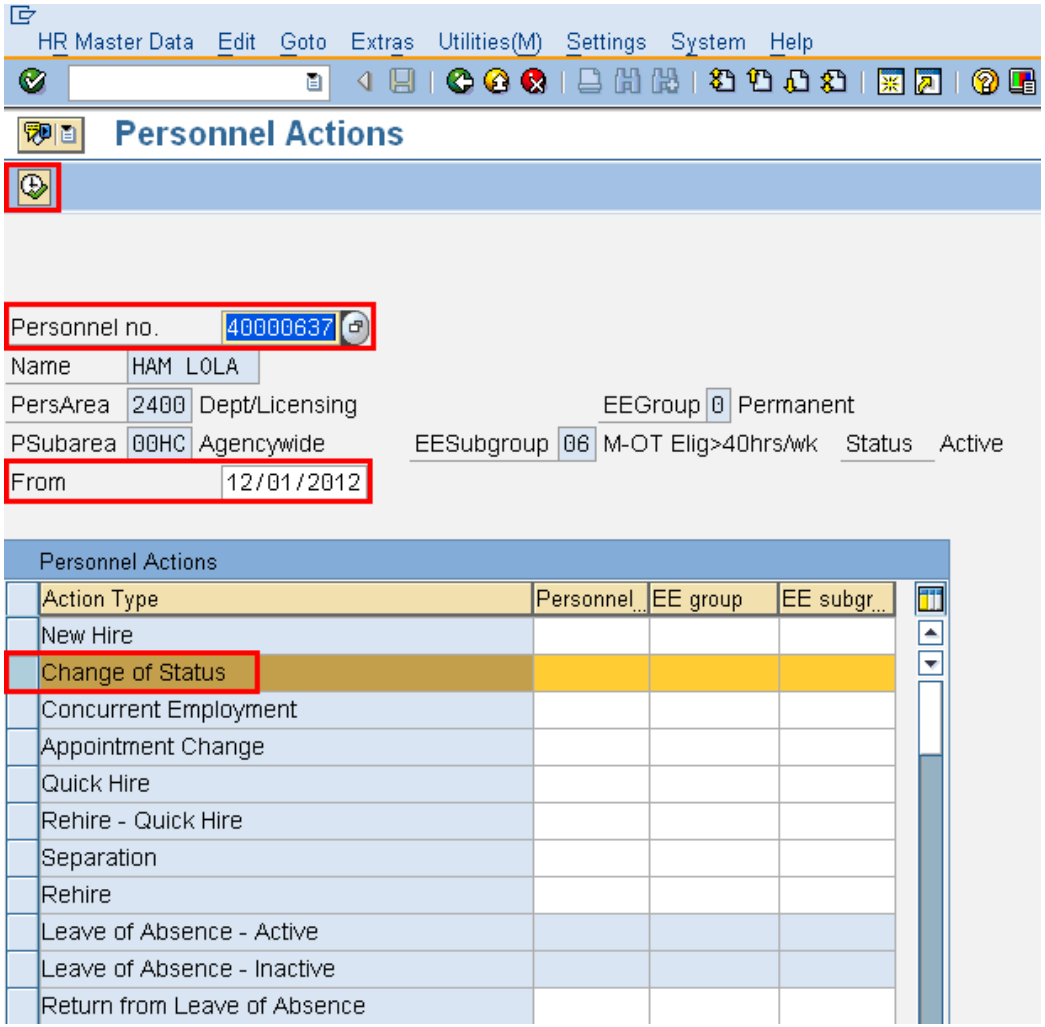
Change of Status

- To create a Change of Status Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field



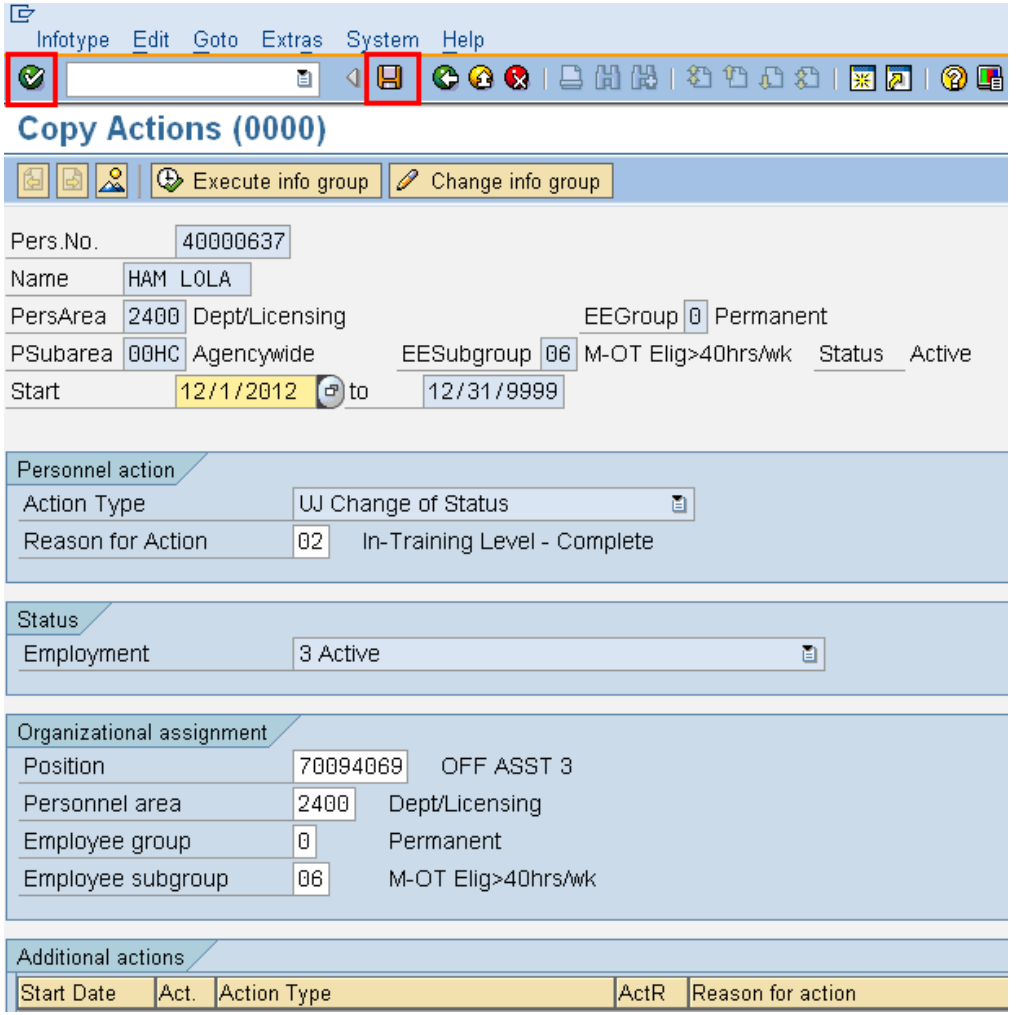
Change of Status Personnel Action

- Fields to complete:
  - **From** (Date of action)
  - **Personnel no.**
- To access the Change of Status action, click the box to the left of Change of Status.
- Then click **(Execute)**.



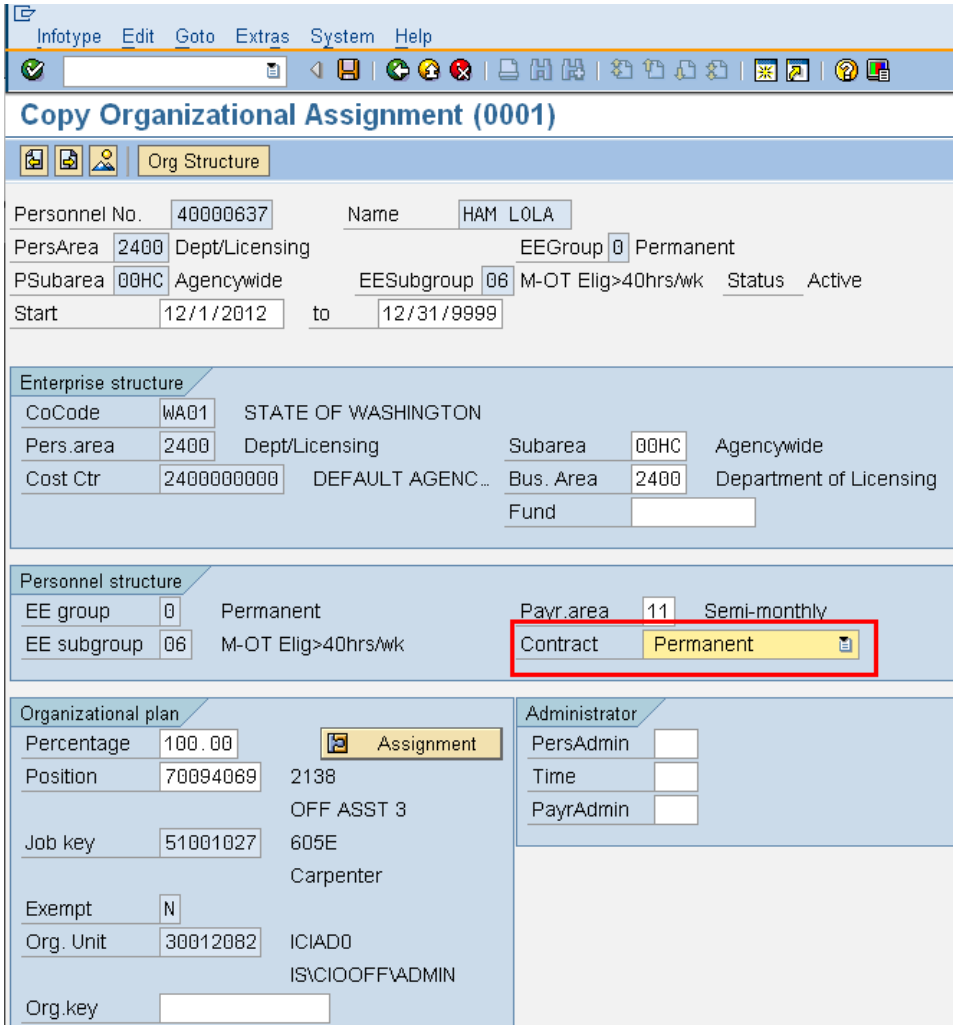
Actions **(0000)**

- Fields to complete
  - **Reason for Action** (use matchcode)
- When finished, click **(Enter)** and then click **(Save)**.



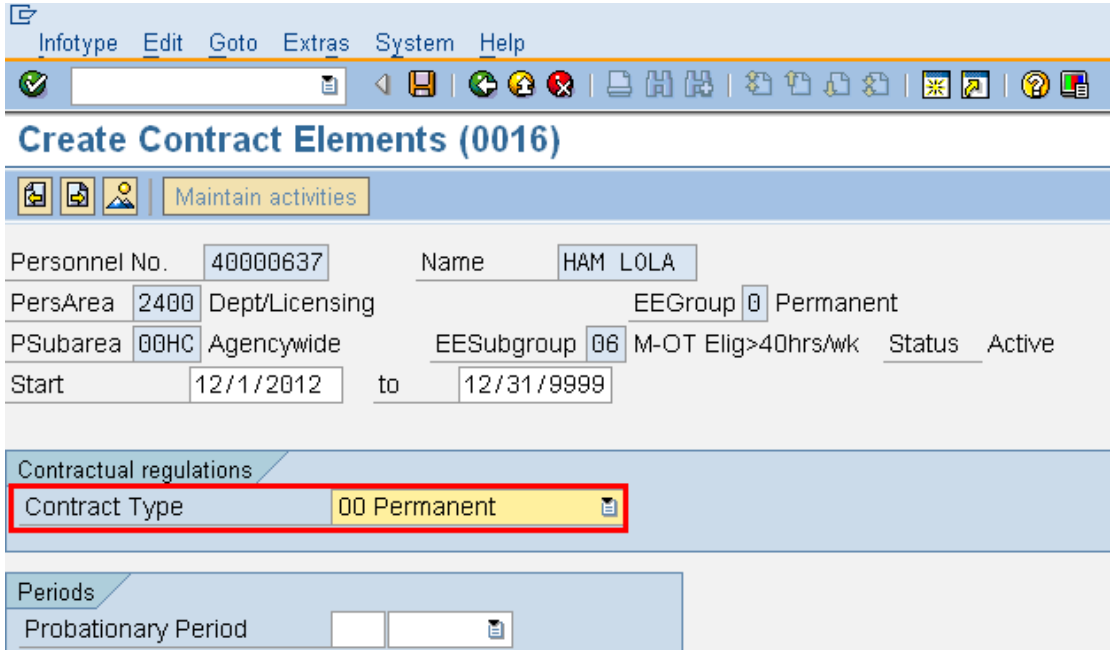
Organizational Assignment (0001)

- Field to complete:
  - **Contract**
    - Permanent
- When finished, click **(Enter)** and then click **(Save)**.



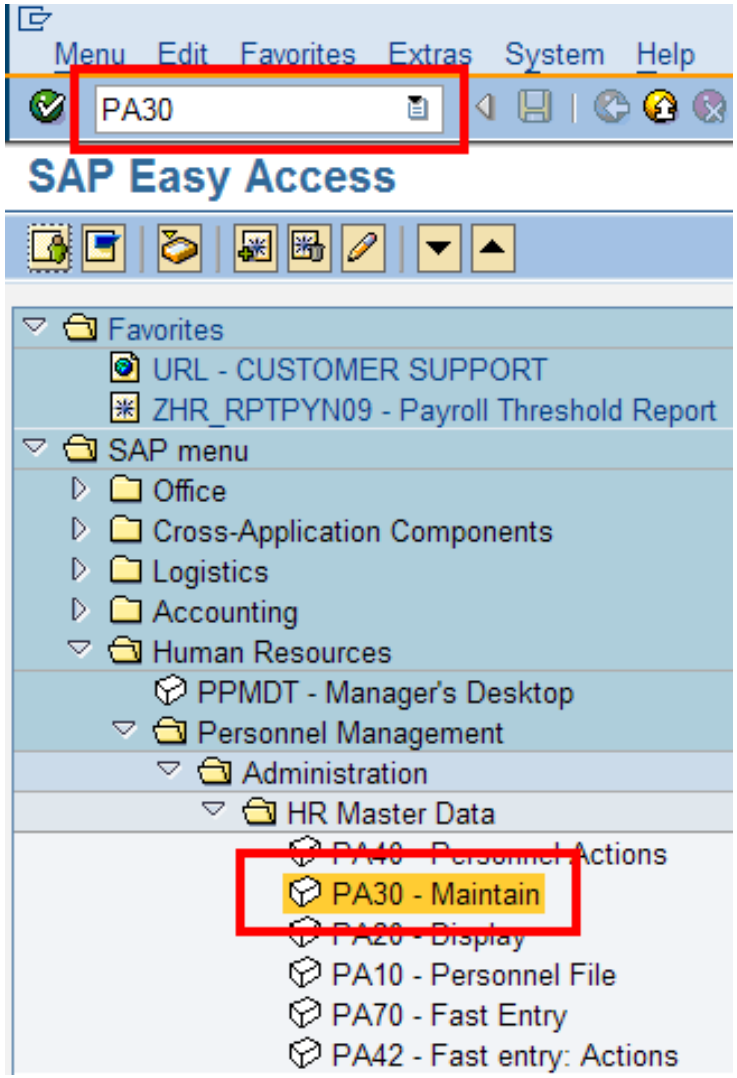
Contract Elements (0016)

- The Contract Elements infotype if the employee's state status (permanent or non-permanent).
- Fields required to complete:
  - **Start**
  - **Contract type**
- Optional field:
  - Probationary period
- When finished, click **(Enter)** and then click **(Save)**.



Monitoring of Task (0019)

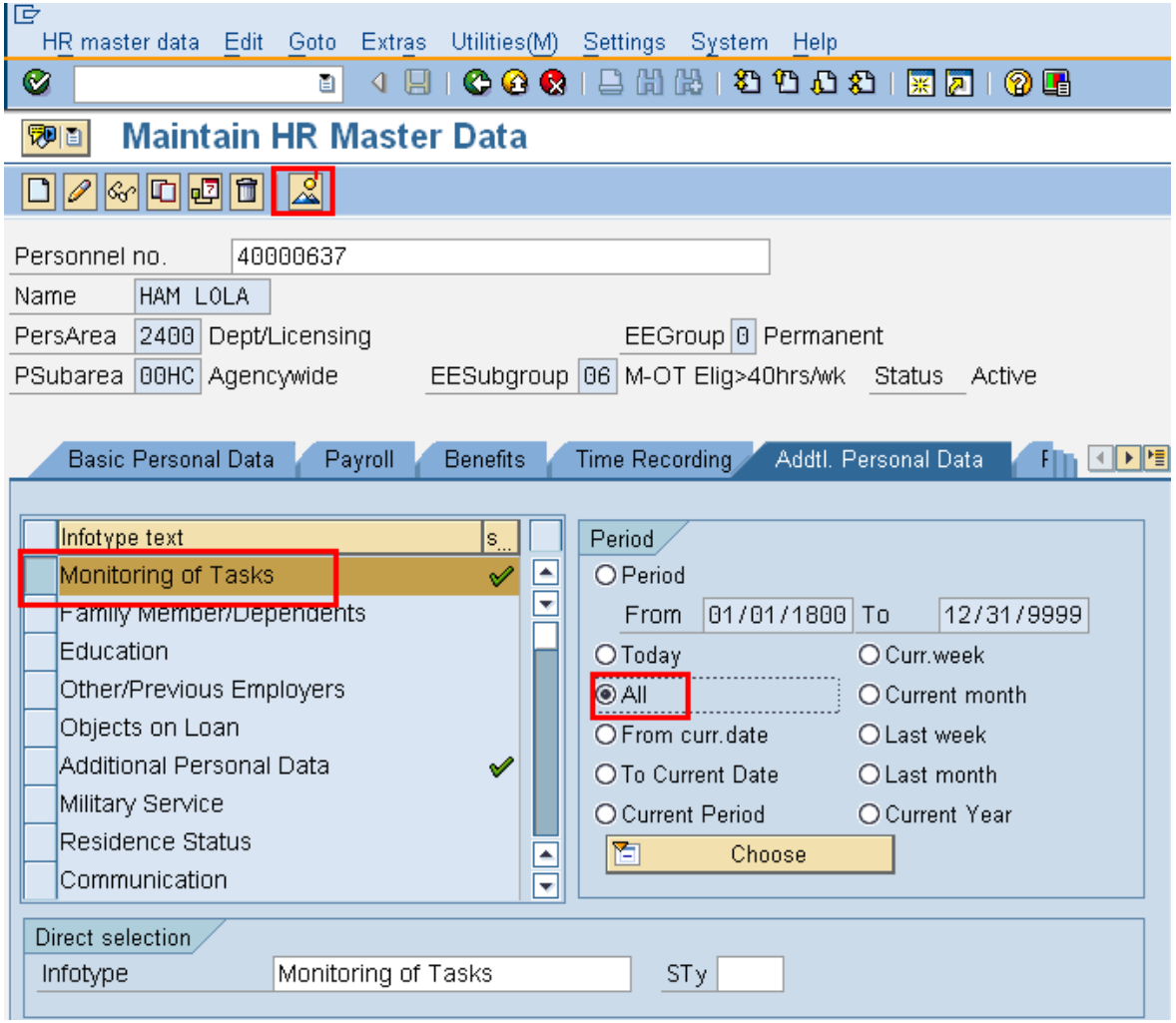
- When the employee's probation period has ended, the *Monitoring of Task* (0019) must be updated.
- To maintain the Monitoring of Task infotype:
  - Follow menu path: Human Resources → Personnel Management → Administration → HR Master Data → Maintain
  - Or enter transaction code **PA30** in the **Command** field



Maintain *Monitoring of Task* (0019)

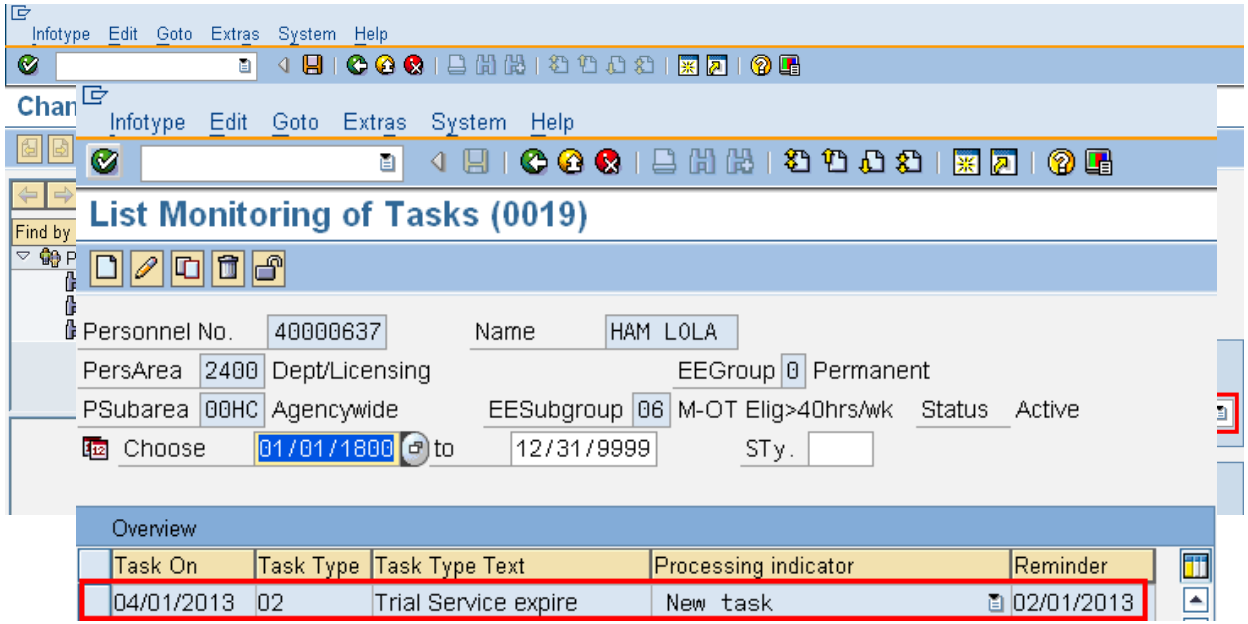
- Click the **Addtl. Personal Data** tab.
- Click the box to the left of the *Monitoring of Task* (0019) to select.
- In the 'Period' section, click

(**All**).
- Click (**Overview**) for an overview of all actions associated with the *Monitoring of Tasks* (0019).



Monitoring of Task (0019)

- Select the appropriate record.
  - **Task Type**
    - Prob per to expire
- Click (**Change**)
- Fields to complete:
  - **Date of Task**
  - **Processing indicator**
    - *Task Completed*
- When finished, click (**Enter**) and then click (**Save**).



HRMS Activity

Process Employee Change of Status

Appointment Change

Appointment Change Overview

- Upon completion of this section, you will be able to:
  - Describe the key terms and concepts associated with the Appointment Change action.
  - Navigate through the Appointment Change action and understand the importance of the information in each infotype.
  - Process an Appointment Change action.

Employee Appointment Change

- Use the Appointment Change action for appointments within the agency and appointments between different agencies.
  - Examples include:
    - Promotion
    - Demotion
    - Transfer
    - Reassignment
    - Reallocations

Appointment Change Action

- The information between the losing agency and the gaining agency can be communicated in a number of ways, depending on agency policy.

- Future leave entries must be deleted prior to the gaining agency keying in the Appointment Change. It is important to contact the losing agency to check for future leave entries.

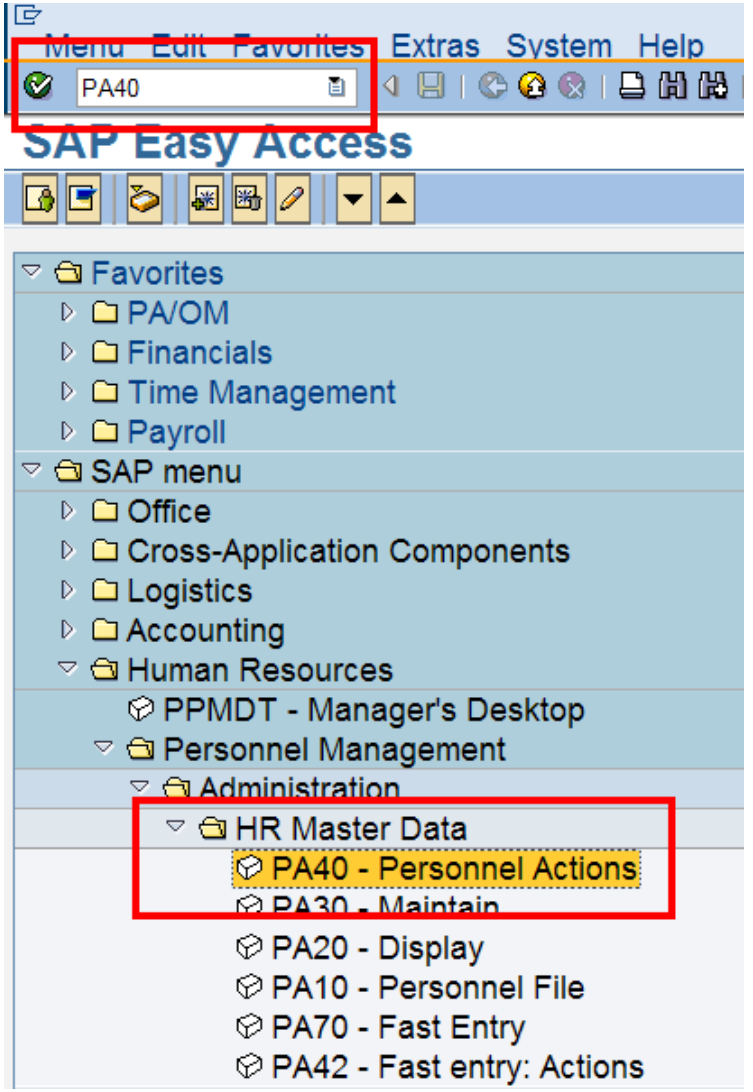
- Employee's information is populated and can be updated once the gaining agency keys the Appointment change.

Appointment Change Infotypes

- Update the following infotypes during the Appointment Change action including:
  - *Actions (0000)*
  - *Organizational Assignment* (0001)
  - Cost Distribution (0027)
  - *Contract Elements* (0016)
  - *Monitoring of Tasks* (0019)
  - *Planned Working Time* (0007)
  - *Date Specifications* (0041)
  - *Basic Pay* (0008)

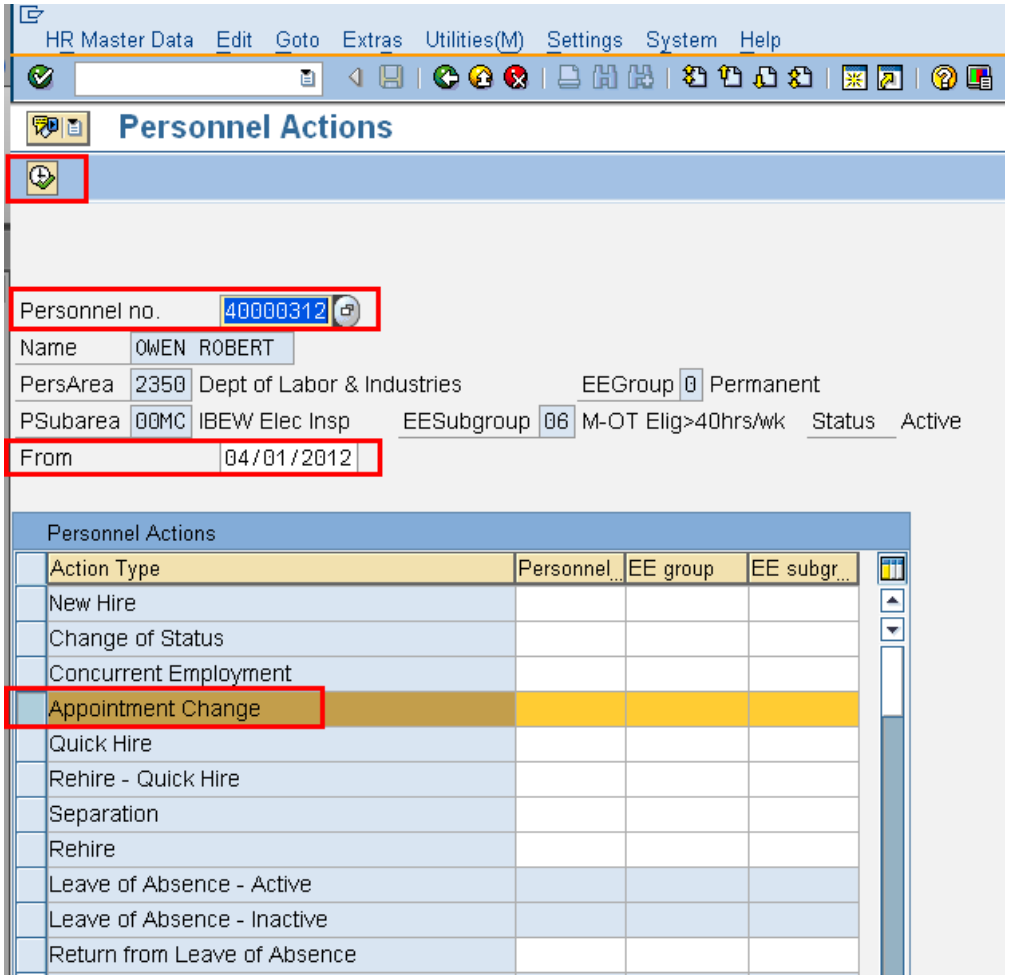
Appointment Change Action

- To create an Appointment Change Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field



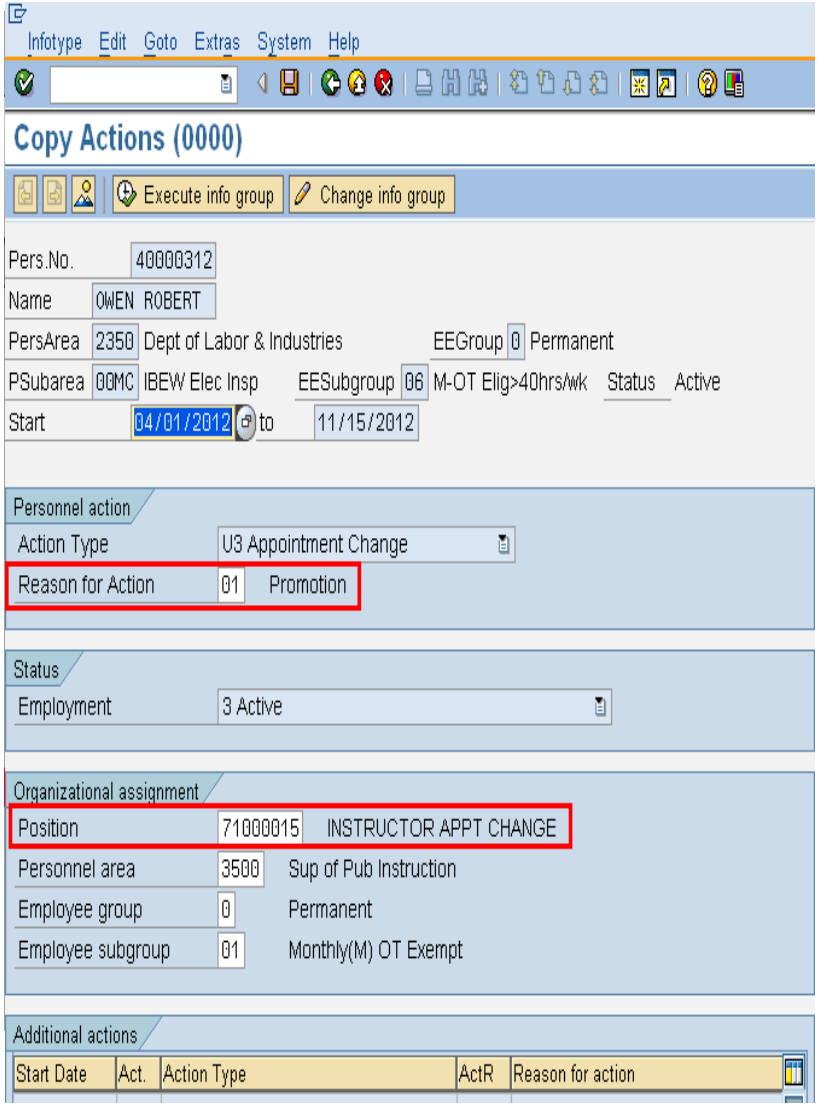
Appointment Change Personnel Action

- A Personnel Number is required to process an Appointment Change.
- To access the Appointment Change action, click the box to the left of *Appointment Change.*
- Fields to complete-
  - **From** *(Date of Hire)*
  - **Personnel no.**
- Then click (**Execute**).



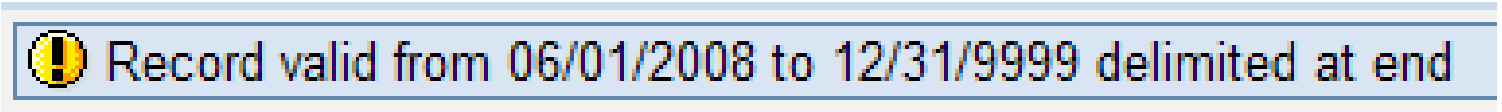
Actions Infotype (0000)

- Fields to complete:
  - **Reason for Action** (use matchcode)
  - **Position**
- Click (Enter) to validate and populate the following fields:
  - Personnel Area
  - Employee Group
  - Employee Sub-group
- When finished, click **(Enter)** and then click **(Save)**.

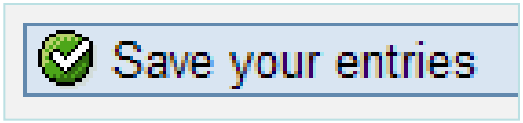


Delimit Message

- The delimit message will appear when validating the information entered on the infotype. The message reads **"Record valid from XX/XX/XXXX to XX/XX/XXXX delimited at end".**

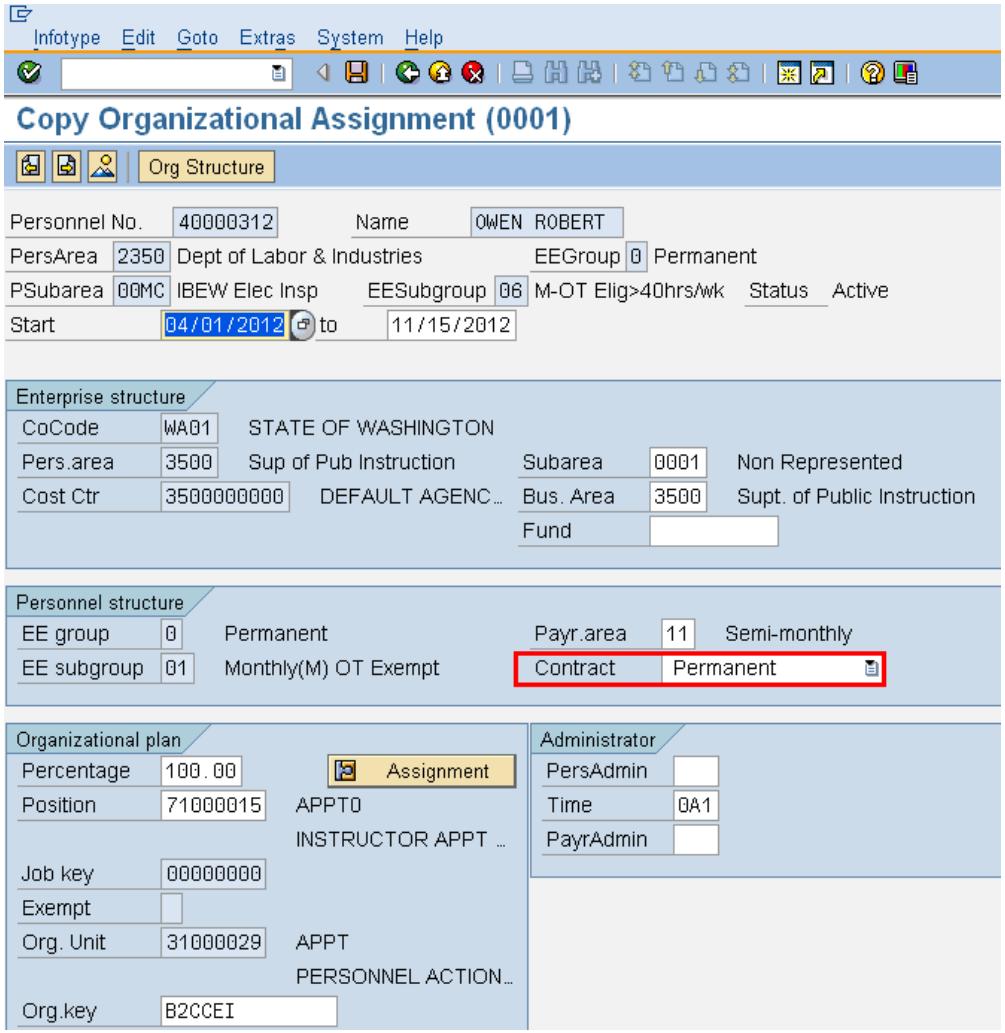


- Continue to **(Enter)** through message until the "Save Your Entries" prompt appears.



Organizational Assignment (0001)

- Field required to complete:
  - **Contract**
    - Permanent
- Optional fields:
  - Org. Key
  - Administrator (Time)
- When finished, click **(Enter)** and then click **(Save)**.
  - If no changes made to the infotype, continue to save.



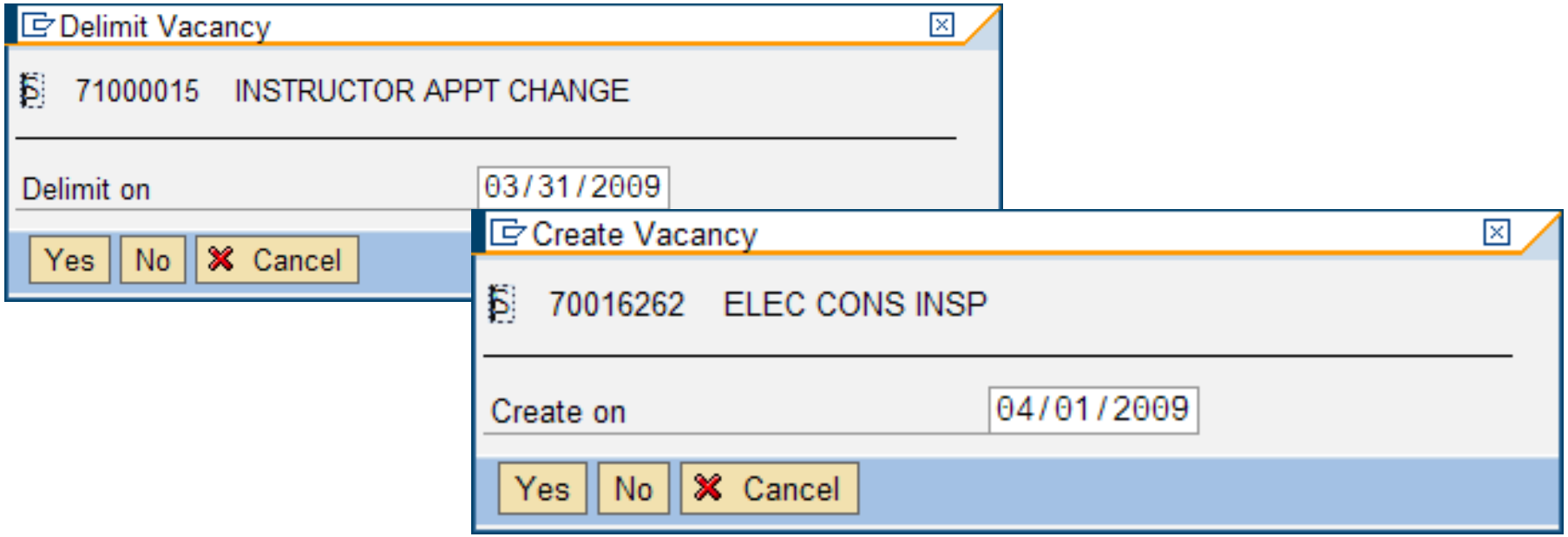
Delimit / Create Vacancy

A feature used to report vacant positions. Information will be updated on the *Position Vacancy* infotype located in Organizational Management.

– This popup window will appear if the position is vacant or if multi-filled.

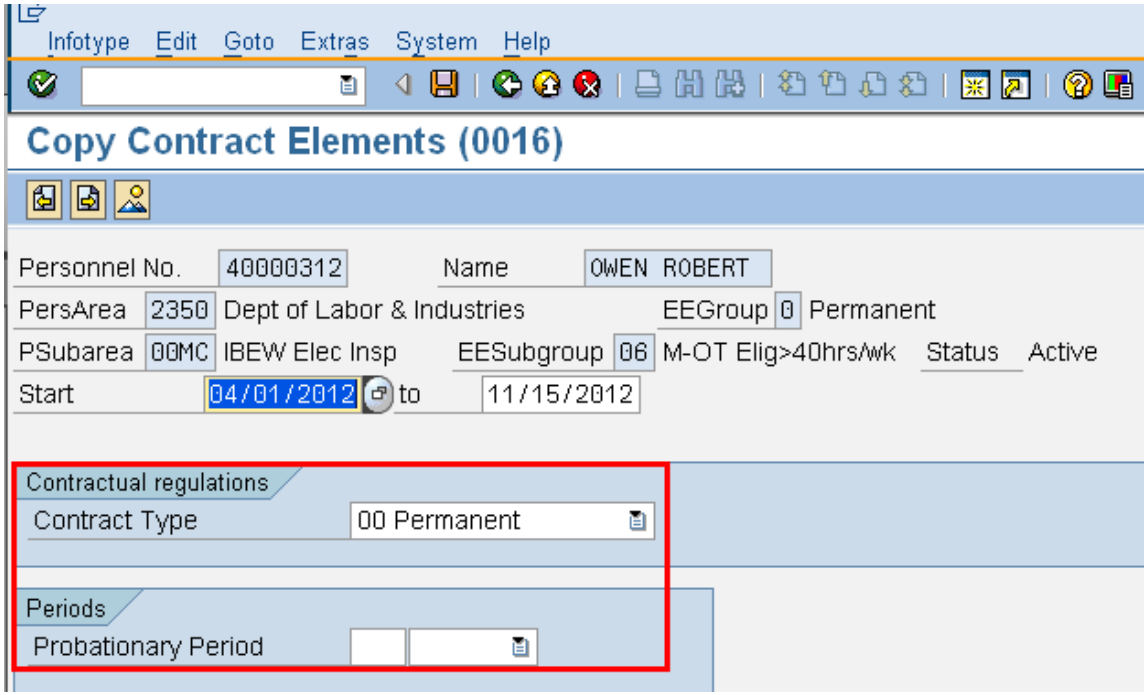
- Click 'Yes' to delimit the vacancy.
- Click 'No' to not delimit the vacancy.

Note: If the position is multi-filled select 'No'.



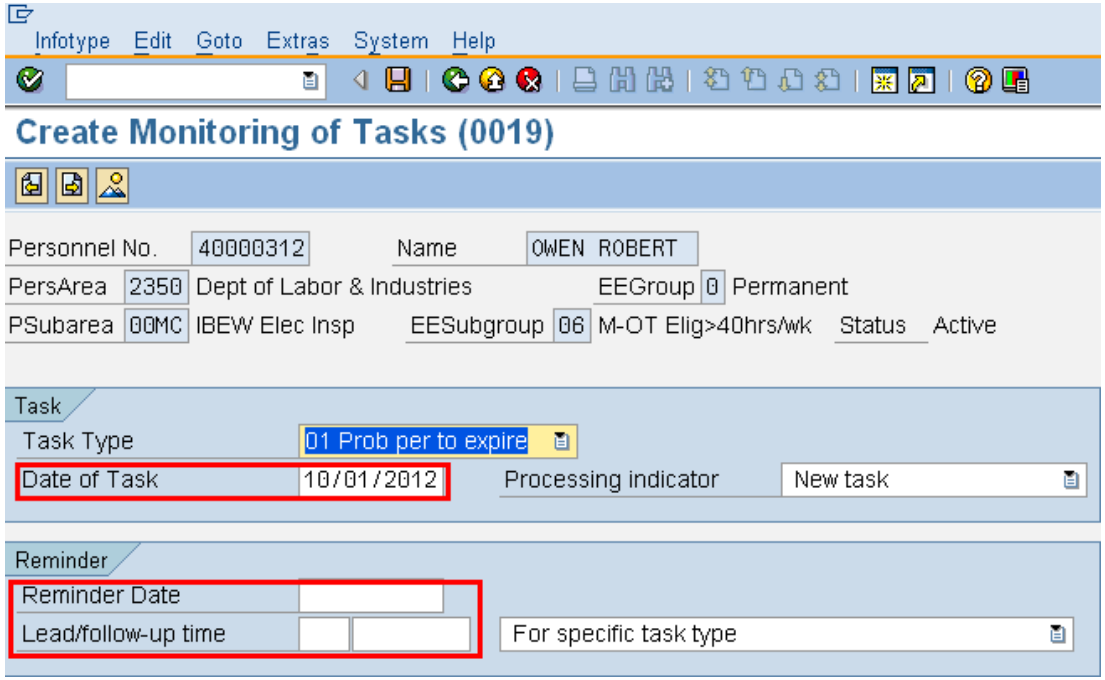
Contract Elements (0016)

- Fields required to complete:
  - **Contract type**
- Optional field:
  - Probationary period
- When finished, click **(Enter)** and then click **(Save)**.



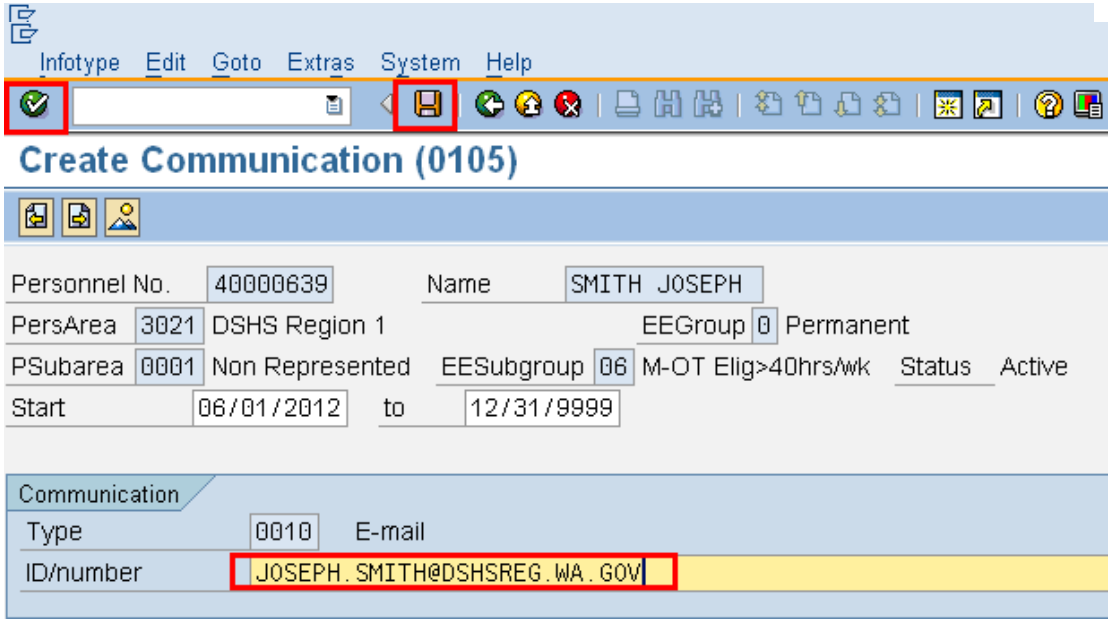
Monitoring of Task (0019)

- The Monitoring of Tasks infotype tracks the dates on which an employee moves from non-permanent status to permanent.
- Fields to complete:
  - **Task Type**
  - **Reminder Date**
- When finished, click **(Enter)** and then click **(Save)**.



Communications (0105)

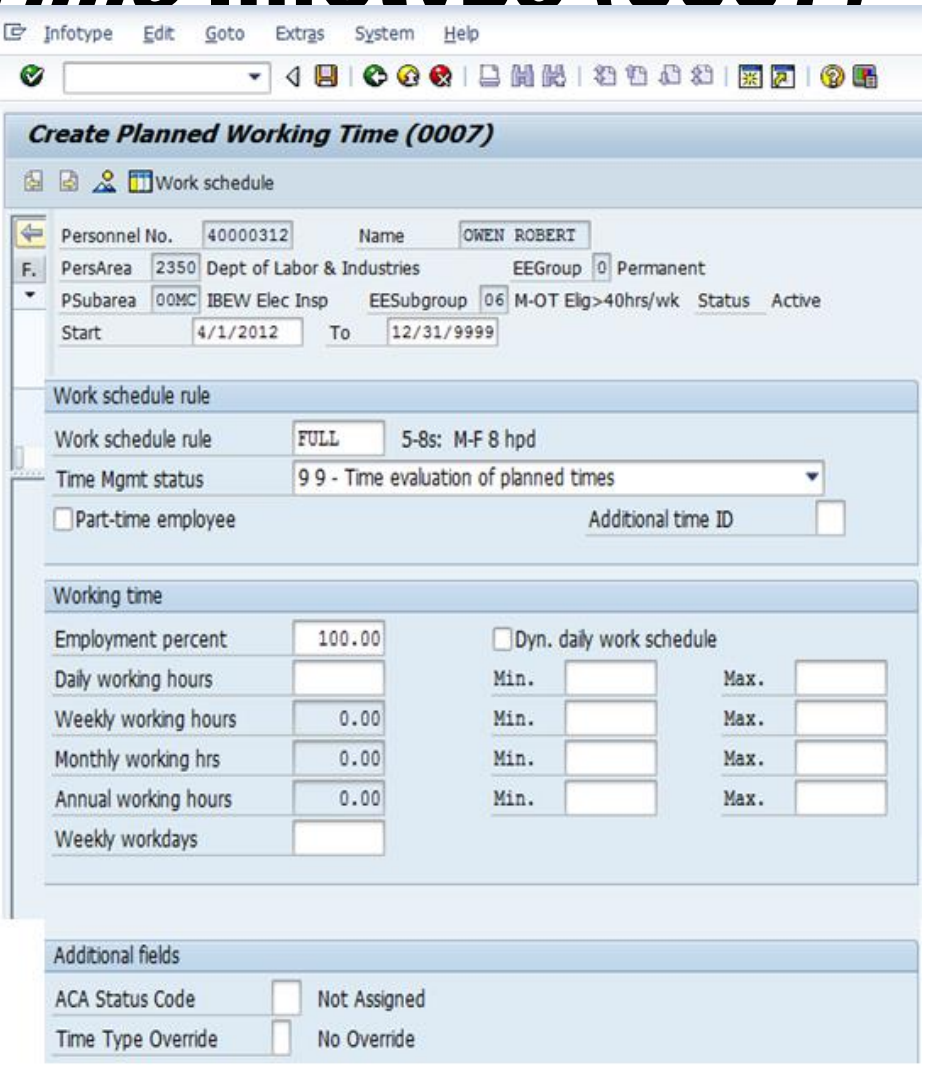
- Field to complete:
  - **ID/number**
- When finished, click **(Enter)** and then click **(Save)**.



Note:
If you do not know the employee's email address at time of hire, click the **next** record button to move to next infotype.

Planned Working Time Infotype (0007)

- Fields to verify/complete:
  - **Work schedule rule**
    - Full 5-8s – M-F (Default)
  - **Time Mgmt status**
    - 9 9 Time evaluation of planned times (Default)
  - **Additional time ID**
    - Default is blank
  - **Employment percent**
    - 100 (Default)
  - **ACA Status Code**
  - **Time Type Override***
- When finished, click **(Enter)** and then click **(Save)**.

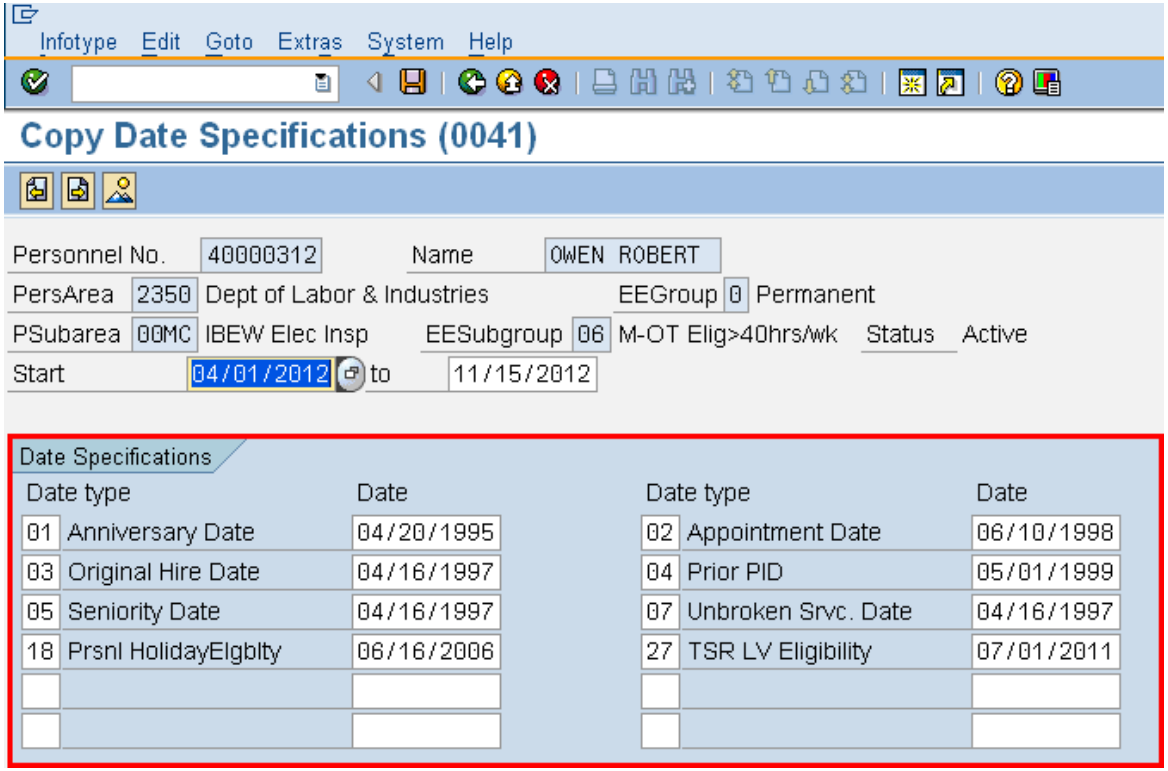


*** Note:**

The Time Type Override box is to only be used by agencies who intend to use TLA

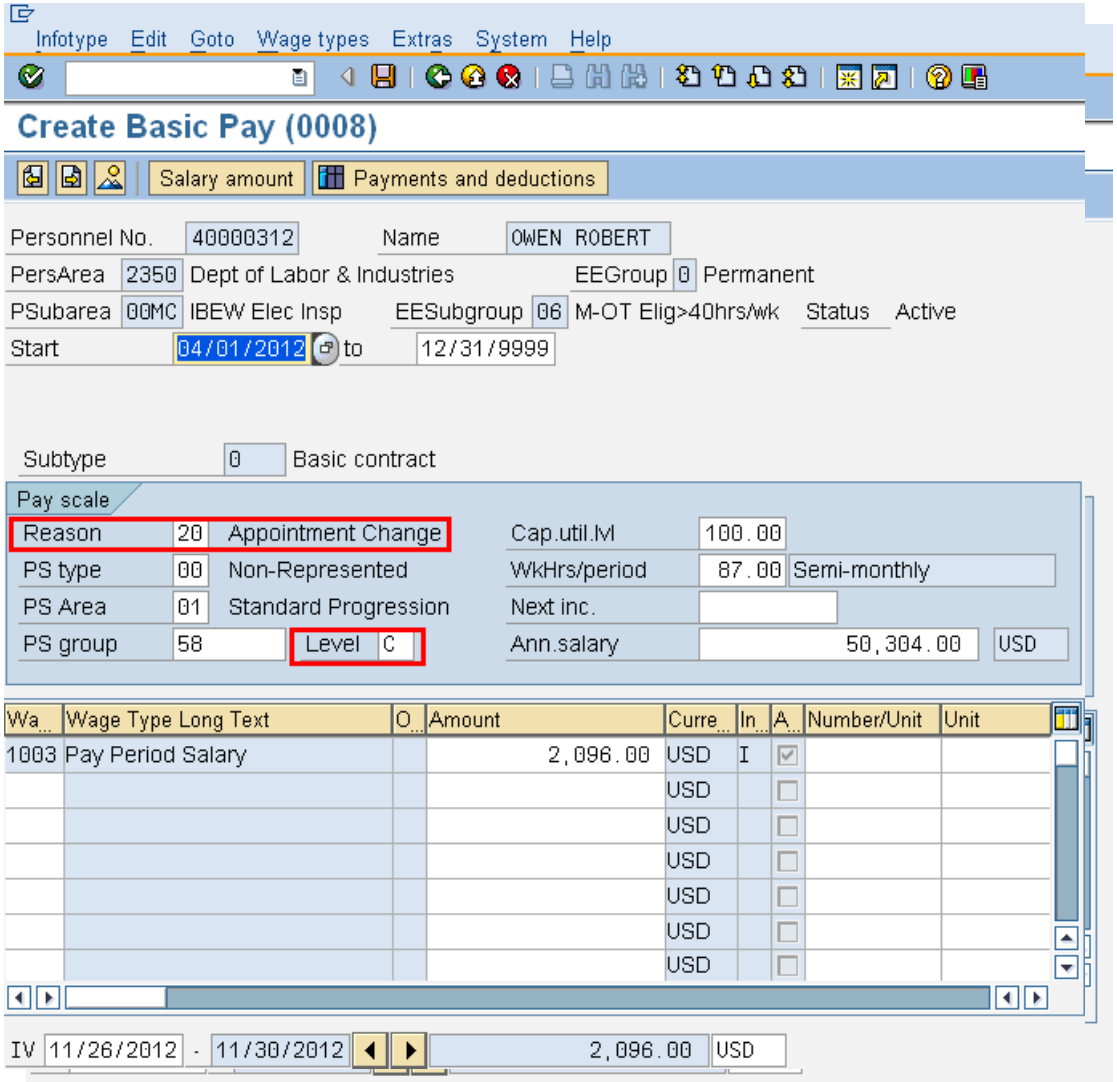
Date Specifications Infotype (0041)

- The Date Specifications infotype documents important dates in employment history.
- All previous dates will default and may need adjustments:
  - Anniversary Date
  - Appointment Date
  - Original Hire Date
  - Seniority Date
  - Unbroken Srvc. Date
  - Prsnl Holiday Eligibility
- When finished, click **(Enter)** and then click **(Save)**.



Basic Pay (IT0008)

- Fields to complete:
  - **Reason**
  - **Next Increase** (Optional)
  - **PS Level**
  - **Capacity utility level** (Defaults in)
- When finished, click **(Enter)** and then click **(Save)**.



Note: If the employee is eligible for a periodic increment (PID) or longevity step, and moves to a new Pay Scale Type, Pay Scale Area, Pay Scale Group or Pay Scale Level, the agency **HR Processors must** input the employee's current PID in the Next Increase field on the Basic Pay Infotype.

Personnel Administration / Payroll Handoff

- After all personnel updates are made to the employee's information, the employee information is transferred to the Payroll Processor.

HRMS Activity

Process an Appointment Change

Review Questions

- **Why is the Appointment Change action similar to the Rehire action?**

- **True or False. When hiring an employee from another agency, the losing agency must separate the employee first.**

Leave of Absences / Return from Leave

Leave of Absence / Return from Leave Overview

Upon completion of this section you will be able to:

- Describe the key terms and concepts associated with the Leave of Absence action.
- Describe the differences between a Leave of Absence – Active action and a Leave of Absence –Inactive action.

Key Terms

Absence	A time period during an employee's planned working time in which the employee does not work, including certain types of leave.
Absence Quota	The total amount of time (in hours or days) employees are allowed to use as absences. There are different Quota types for different Absence types. (i.e.. Sick leave quota, Annual leave quota)

Leave of Absence

- An ***absence*** is a time period during an employee's planned working time in which the employee does not work, including certain types of leave.
  - Absences are entered into the Cross Application Time Sheet (ESS or agency specific system) where it is transferred into HRMS and accessed to process payroll.
- Extended Leave of Absences may include:
  - Educational Leave
  - Military Leave
  - L&I

Leave of Absence – cont'd

- Employees are given ***absence quotas*** that are determined by their position, years of service and other factors. The absence quota varies by agency, as well as the collective bargaining unit the employee is in.
- An employee's level of seniority is dependent on the amount worked at the State of Washington, as well as the positions that have been held.

Leave of Absence – Key Points

- Use the *Monitoring of Tasks* infotype to set reminder dates for a return from leave.
- You can enter the Leave of Absence action as soon as it is known that a leave will occur. (Effective Dating)
- If the employee has accrued enough leave to cover the time period, they may receive pay and are placed on a **Paid Leave of Absence** action. If not, they are placed on an **Unpaid Leave of Absence.**

Leave of Absence

- The Leave of Absence action is divided into two main types of leave:
  - Active (Paid)
  - Inactive (Unpaid)

Leave of Absence- Inactive

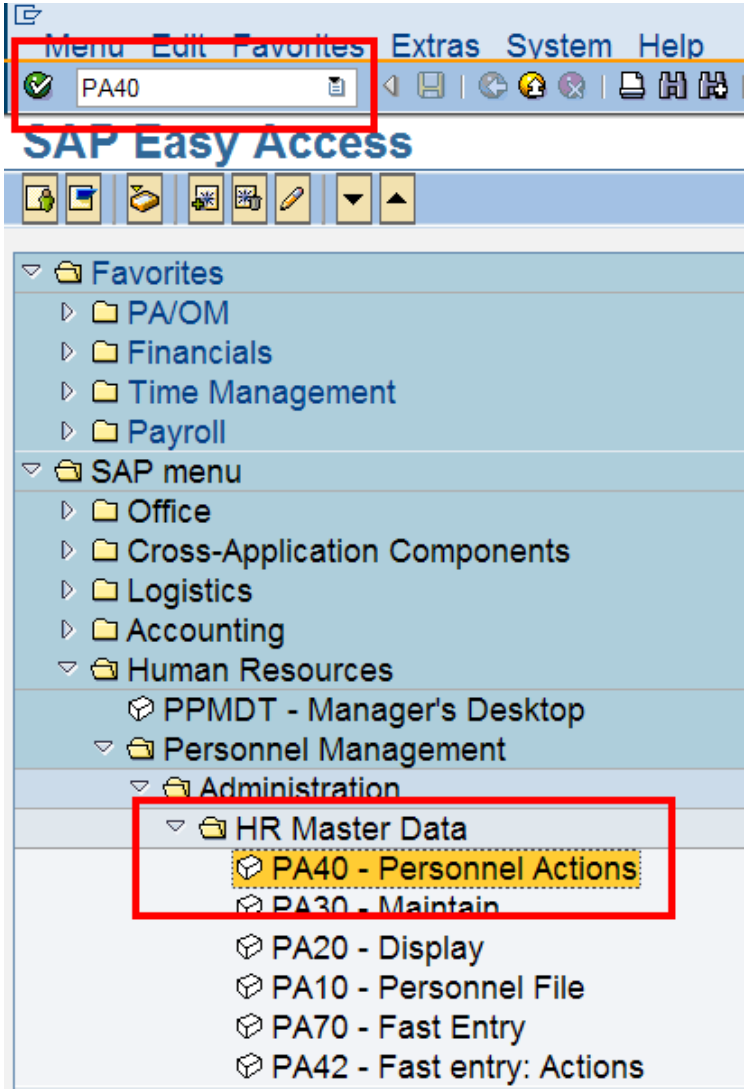
- A **Leave of Absence – Inactive** action is processed in HRMS when an employee takes leave for a significant period of time (exceeds 15 consecutive calendar days or more) and is not paid during that time.
  - For example, an employee takes three weeks leave to care for a sick family member for which they have no paid leave available.
- Many types of leave (maternity, sick) may be covered for a certain period of time.
- To process a **leave of absence- Inactive** action, follow agency business process:
  - When an employee is on a **leave of absence- Inactive** their system status becomes ‘inactive’. The Time & Attendance Processor will **not** be able to enter leave in CATS.
  - An **leave of absence-Inactive should not** be used if the employee is submitting 8 hours of leave a month to maintain their insurance benefits.

Leave of Absence- Inactive Infotypes

- Update the following infotypes during the **Unpaid Leave of Absence** action including:
  - *Actions* (0000)
  - *Organizational Assignment* (0001)
  - *Monitoring of Tasks* (0019)

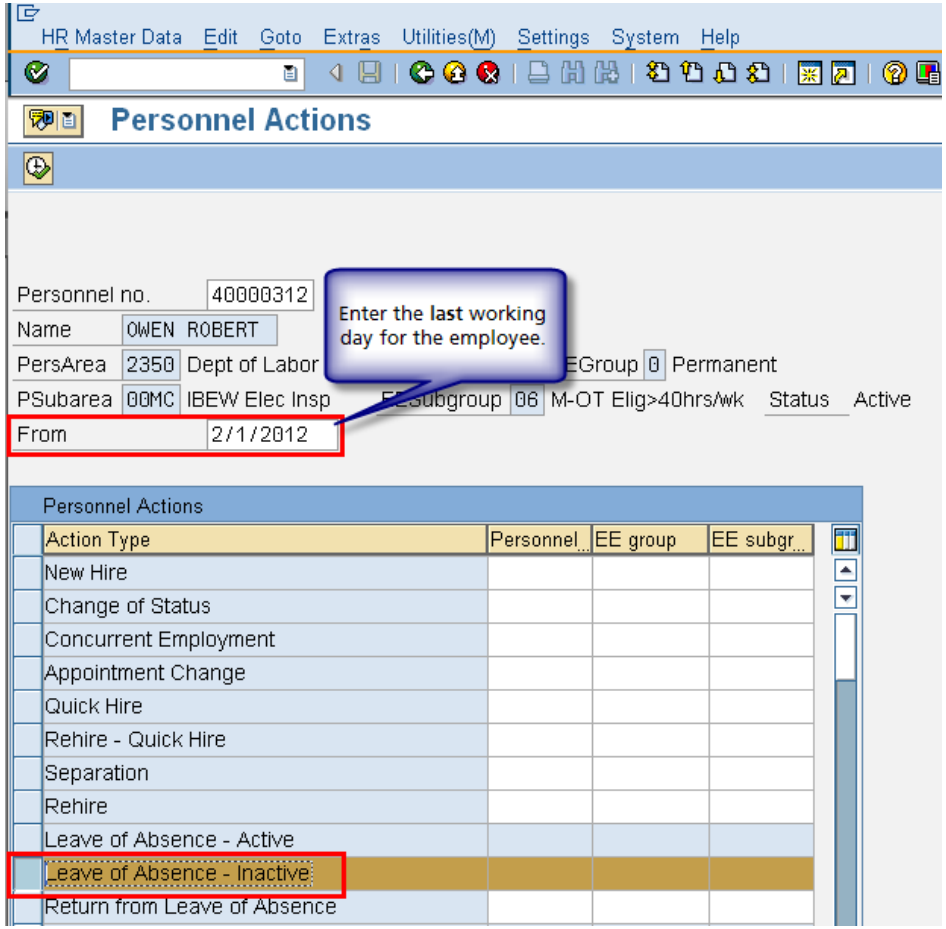
Leave of Absence- Inactive Personnel Action

- To create an Unpaid Leave of Absence Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field



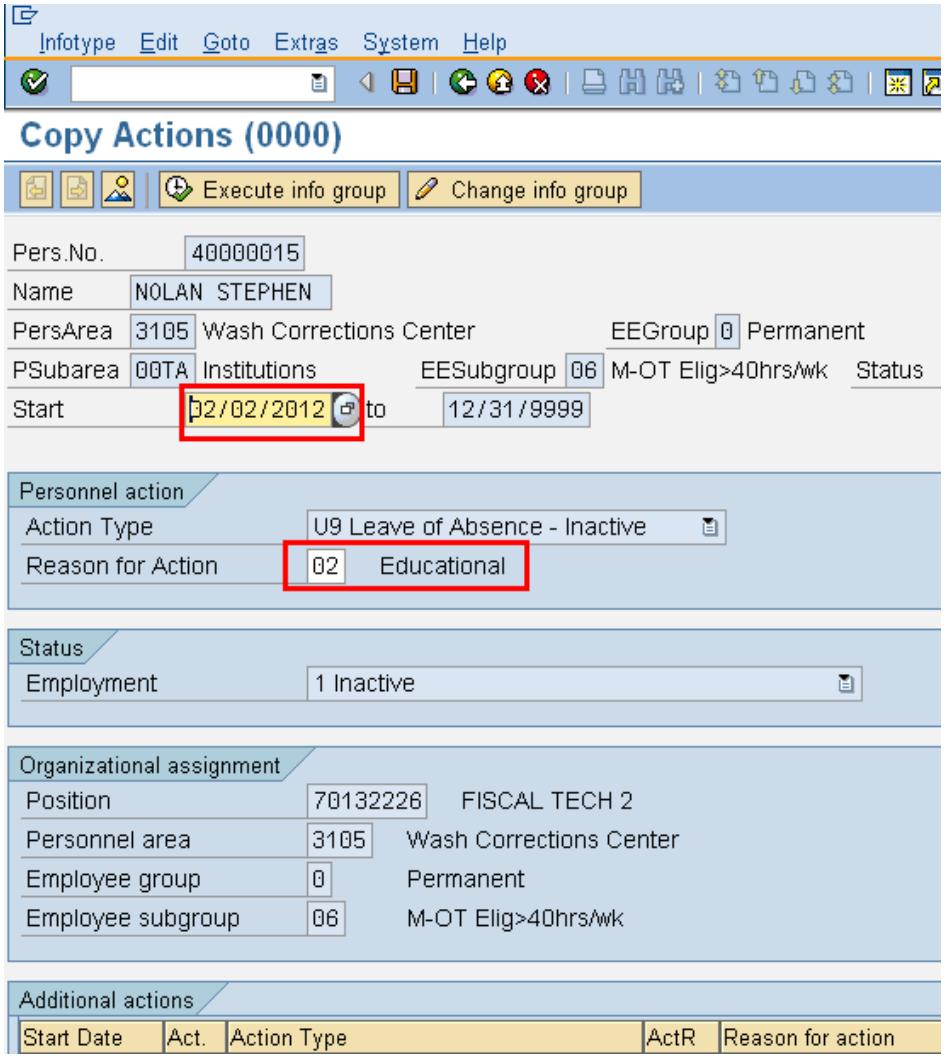
Leave of Absence- Inactive

- Fields to complete:
  - **From** (Last working day of the employee.)
  - **Personnel no.**
- To access the Unpaid Leave of Absence action, click the box to the left of Leave of Absence- Inactive.
- Then click **(Execute)**.



Actions (0000)

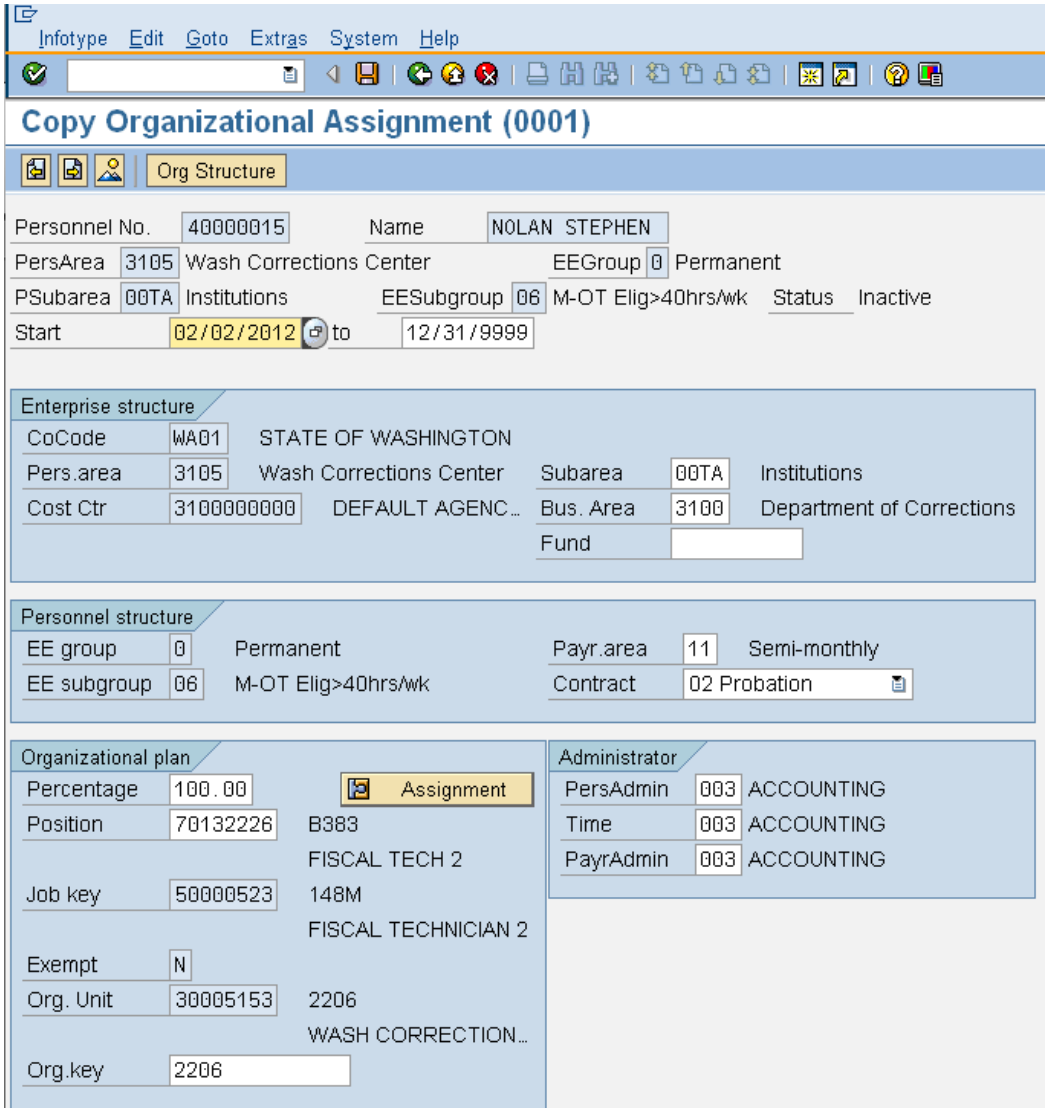
- Fields to complete:
  - **Reason for Action** (use matchcode)
- When finished, click **(Enter)** and then click **(Save)**.



Note: The system has added a day to the Start date. The start day becomes the first day the employee starts leave. The Employment status now reads 'Inactive' as well.

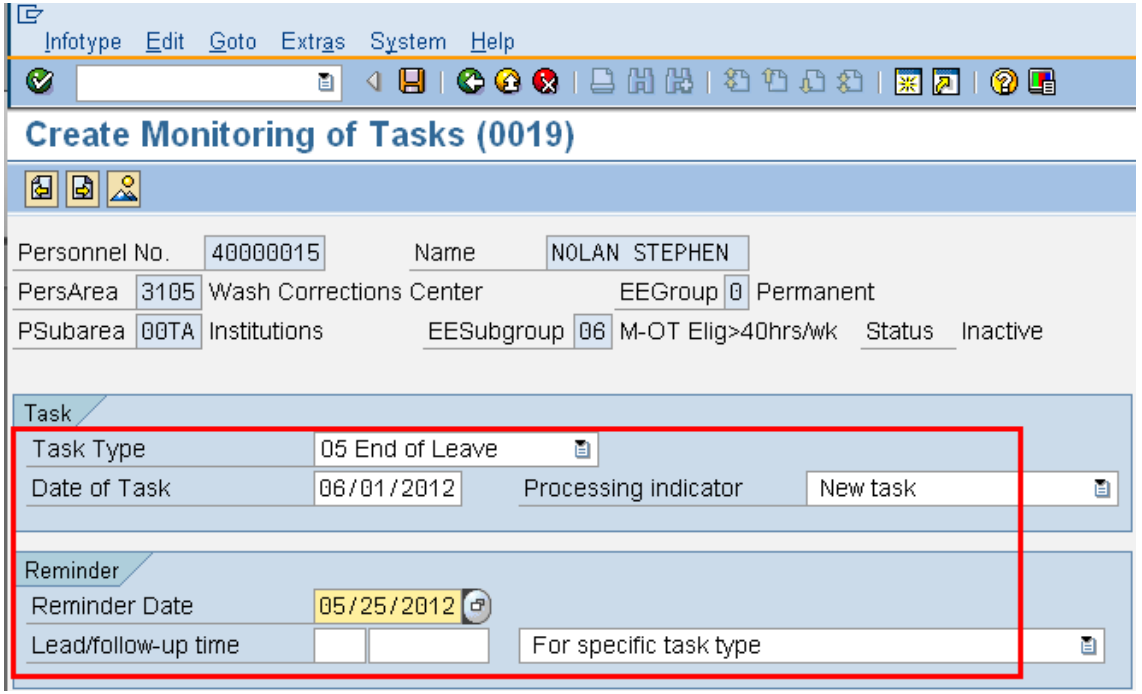
Organizational Assignment (0001)

- Verify the information is correct.
- When finished, click **(Enter)** and then click **(Save)**.
  - If no changes to the infotype, continue to save.



Monitoring of Tasks (0019)

- Fields to complete:
  - **Task Type**
  - **Date of Task**
  - **Processing Indicator**
  - **Reminder Date**
- When finished, click **(Enter)** and then click **(Save)**.



Personnel Administration / Payroll

- There is no handoff to the Payroll Processor, but they should be notified that the employee has been placed on Leave of Absence.

Leave of Absence- Active

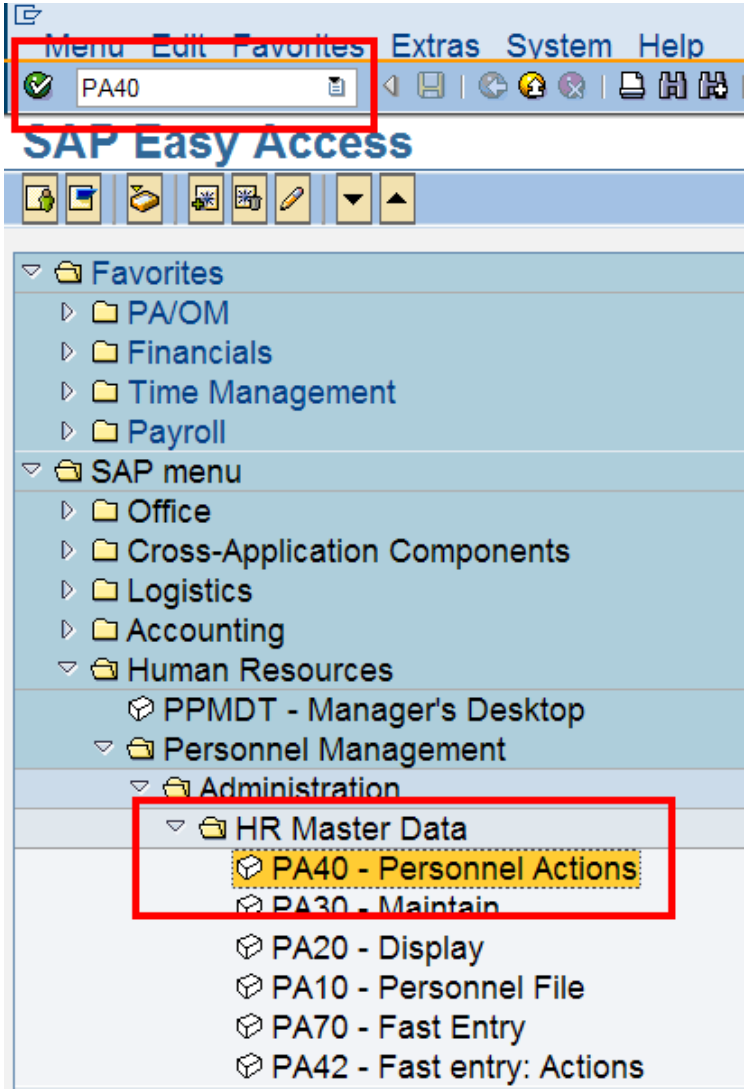
- A **leave of absence- Active** action is processed in HRMS when an employee takes leave for a significant period of time (exceeds 15 consecutive calendar days or more) and is paid (or unpaid) during that employment time.
  - The employee should be placed on **leave of absence- Active** if they are on leave without pay, but are using 8 hours of leave a month to maintain their insurance benefits.
    - The employee's status would remain 'active' while on Paid Leave of Absence.
- A **leave of absence- Active** can be granted for a number of reasons:
  - Sick Leave / Annual Leave
  - Military Leave with Pay
  - Family Medical Leave Act

Leave of Absence- Active Infotypes

- Update the following infotypes during the Paid Leave of Absence action including:
  - *Actions (0000)*
  - *Organizational Assignment* (0001)
  - *Monitoring of Tasks* (0019)

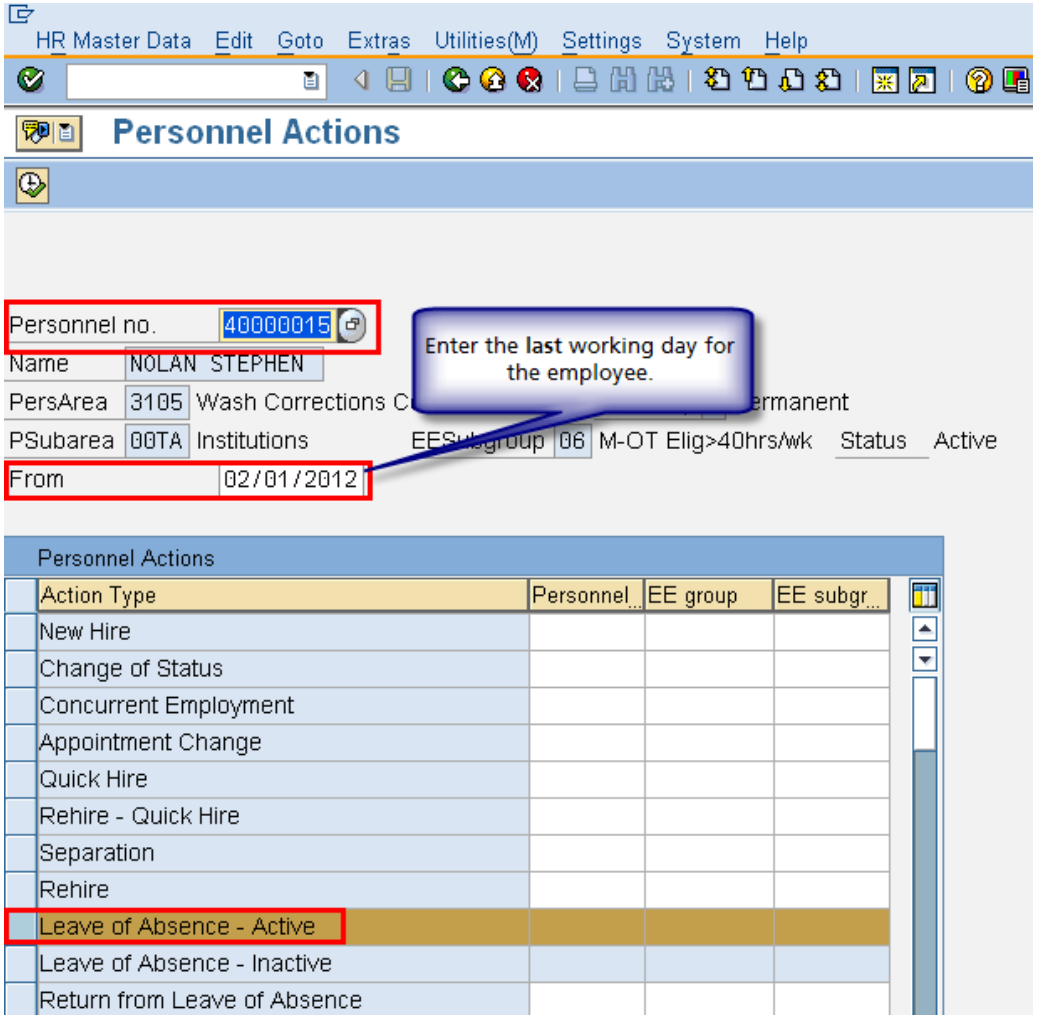
Leave of – Active

- To create an Leave of Absence Action- Active using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field



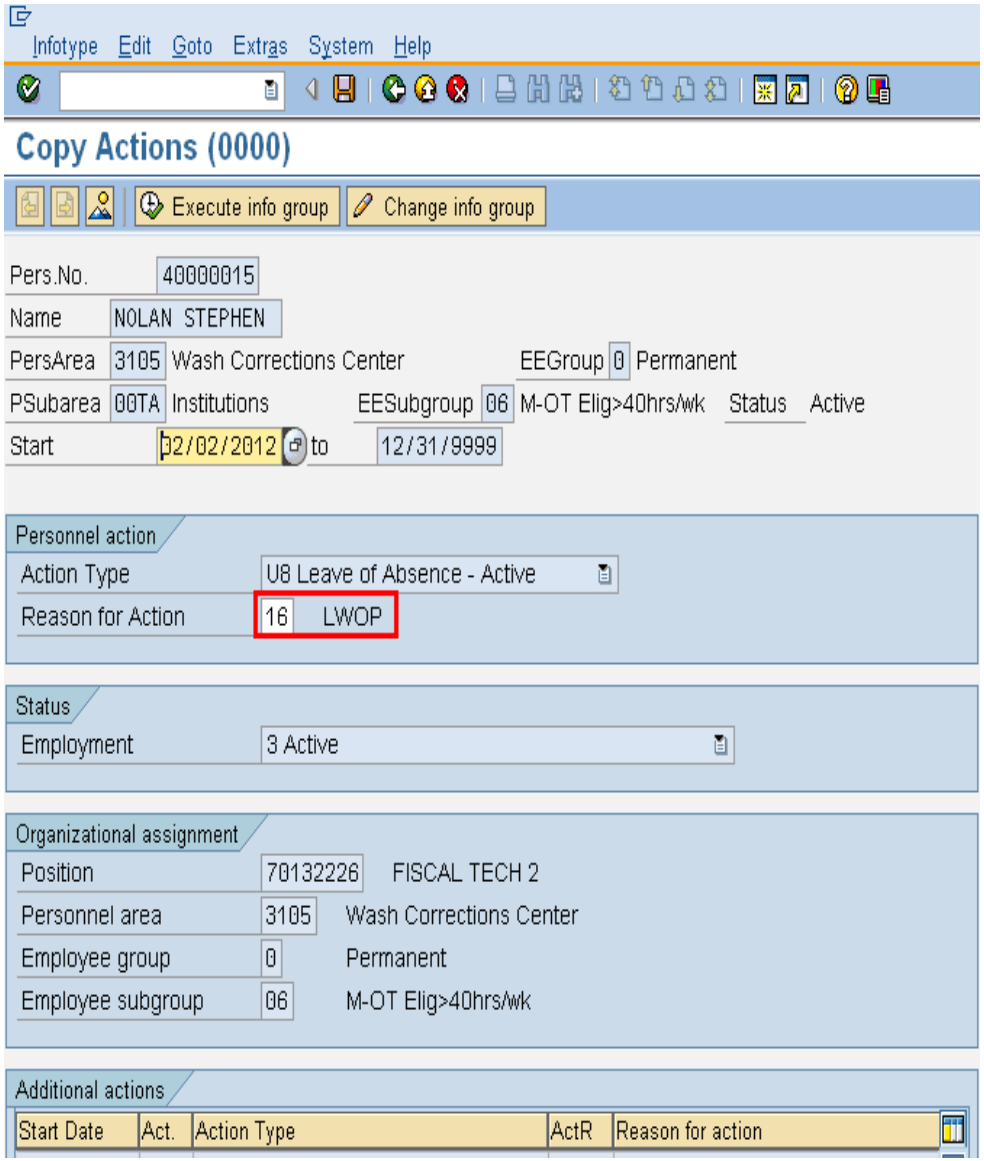
Leave of Absence- Active

- Fields to complete:
  - **From** *(Last working day of the employee)*
  - **Personnel no.**
- To access the Leave of Absence- Active action, click the box to the left of *Leave of Absence- Active.*
- Then click (**Execute**).



Actions (0000)

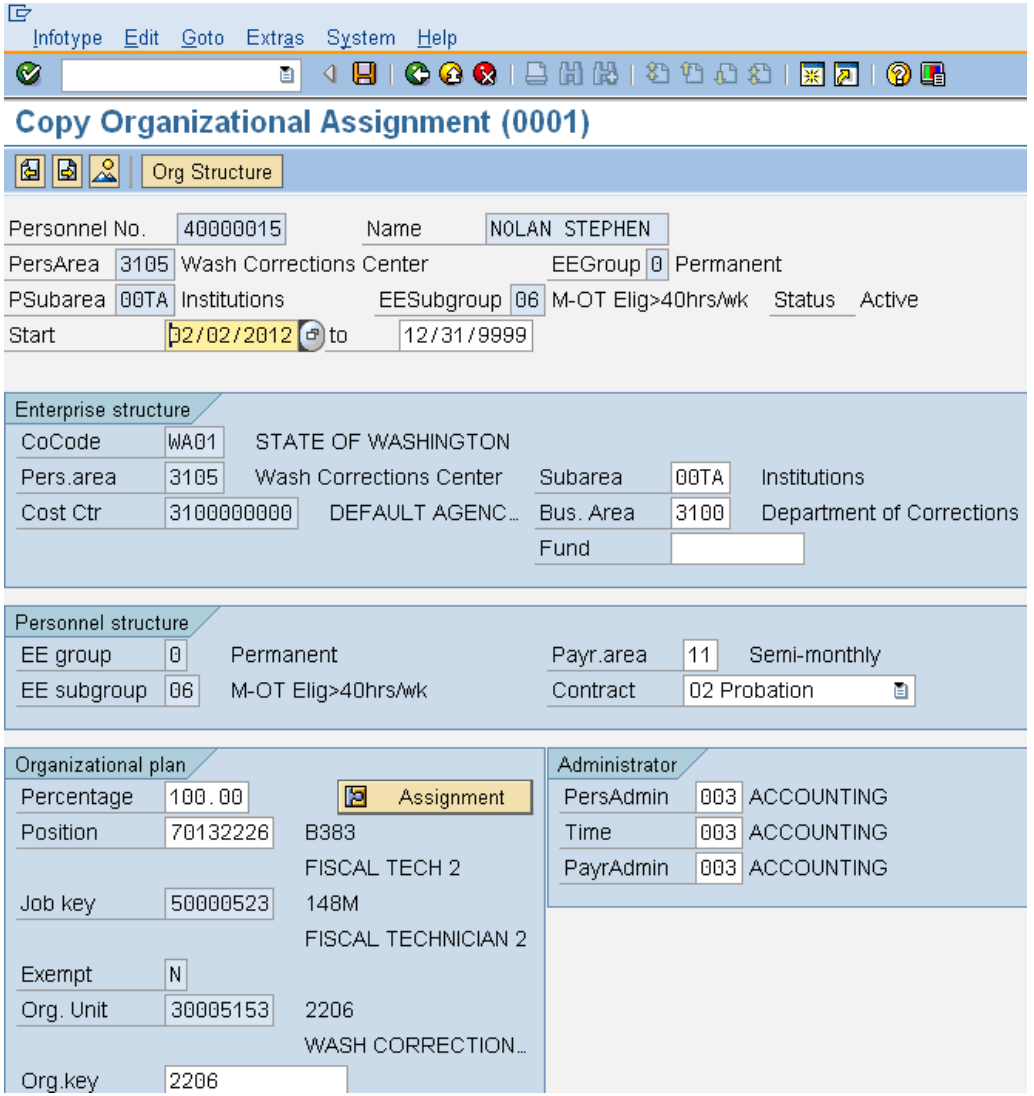
- Fields to complete:
  - **Reason for Action** (use matchcode)
- When finished, click **(Enter)** and then click **(Save)**.



Note: The system has added a day to the State date. The start day becomes the first day the employee starts leave.

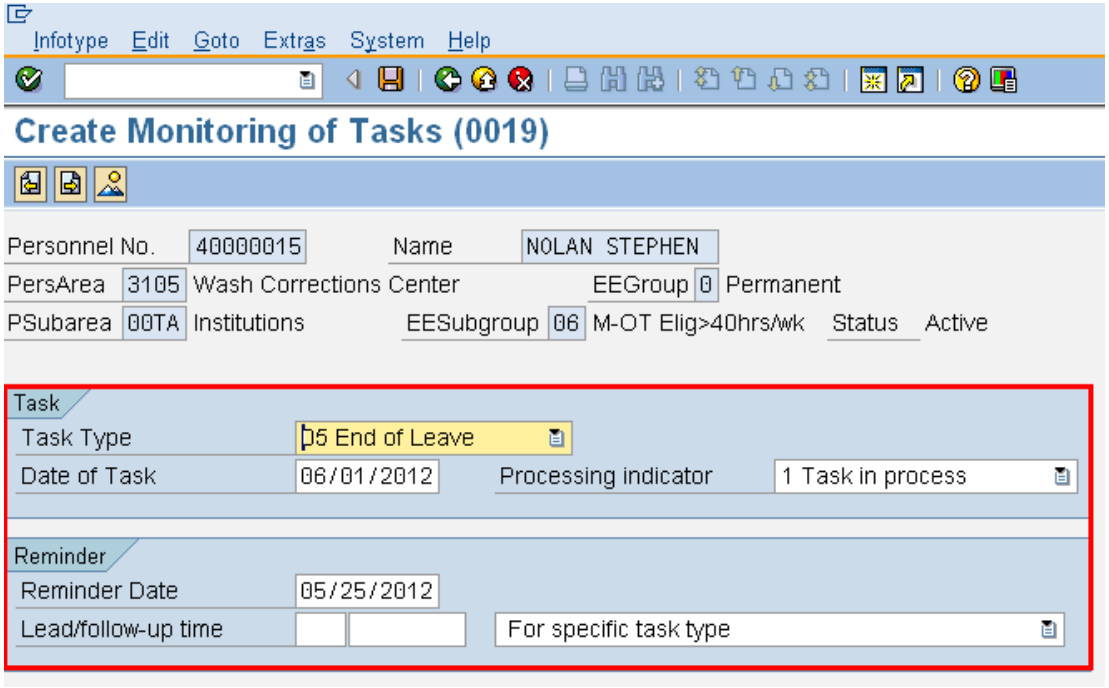
Organizational Assignment (0001)

- Verify the information is correct.
- When finished, click **(Enter)** and then click **(Save)**.
  - If no changes are made to the infotype, continue to save.



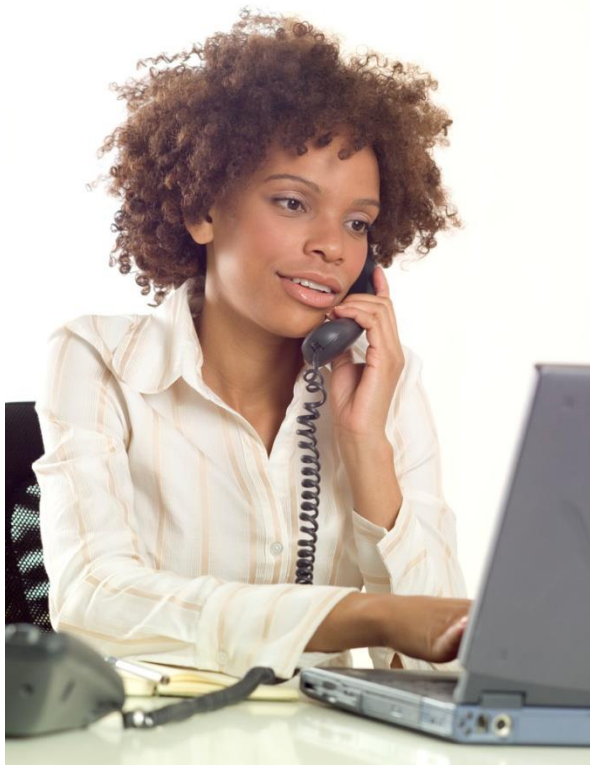
Monitoring of Tasks (0019)

- Fields to complete:
  - **Task Type**
  - **Date of Task**
  - **Processing Indicator**
  - **Reminder Date**
- When finished, click **(Enter)** and then click **(Save)**.



Personnel Administration / Payroll

- There is no handoff to the Payroll Processor, but they should be notified that the employee has been placed on Leave of Absence.



HRMS Activity

Process Paid Leave of Absence

Review Questions

- **Why would you use a Leave of Absence- Active for an employee who is out on leave without pay?**

_____

_____

- **A Leave of Absence- Inactive is processed in HRMS when the employee takes how many consecutive days off?**

_____

Return from Leave of Absence

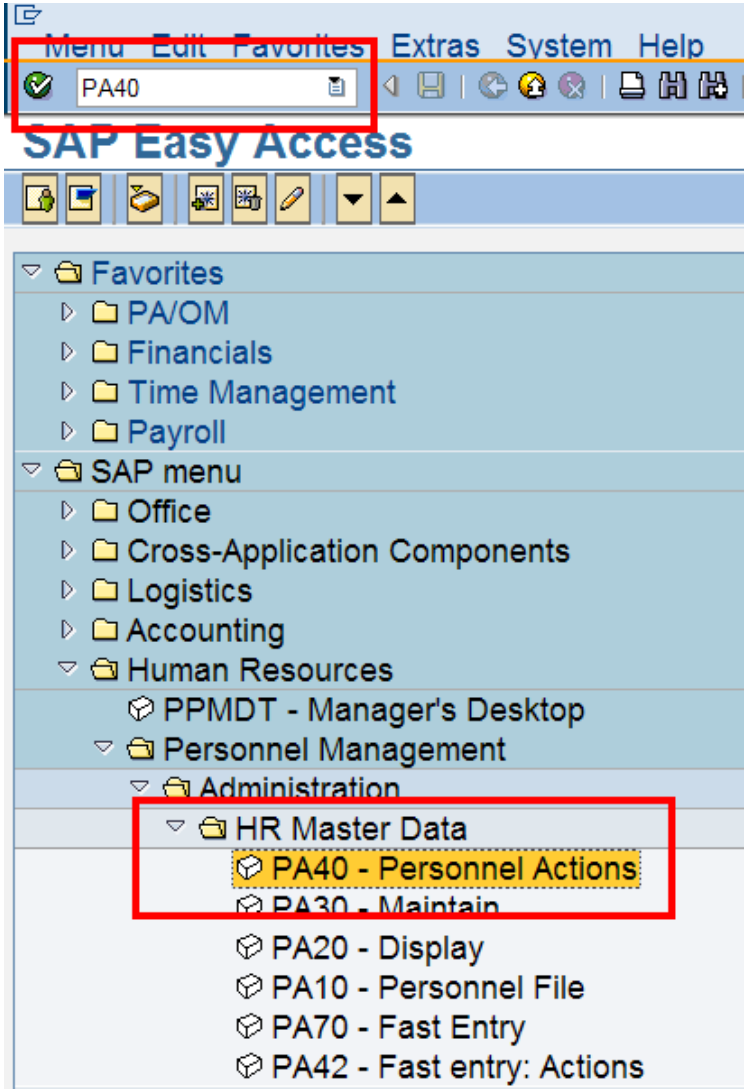
- The Return from Leave of Absence action records an employee returning from a Leave of Absence (active or inactive
- To process the Return from Leave of Absence you must receive verification from the employee's supervisor.
  - This requirement is agency specific. Please check with your agency on the needs for the process.
- Though an end date has been set up through HRMS when leave was recorded you must complete the Return from Leave of Absence action and *Monitoring of Task* (0019).

Return from Leave of Absence Infotypes

- Update the following infotypes during the Leave of Absence - Active action including:
  - *Actions* (0000)
  - *Organizational Assignment* (0001)
  - *Date Specifications* (0041)
- Use **PA30** to maintain the following infotype:
  - *Monitoring of Task* (0019)

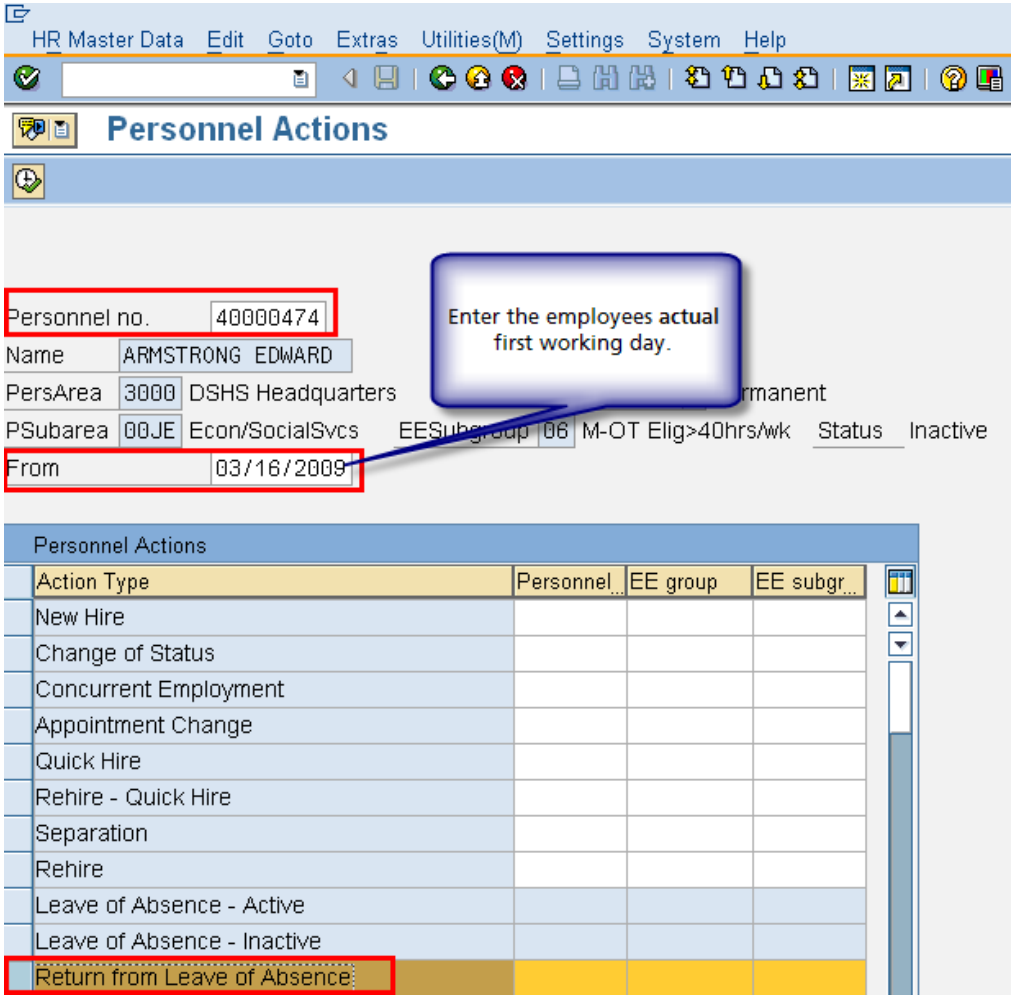
Return from Leave of Absence Personnel Action

- To create a Return from Leave of Absence Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field



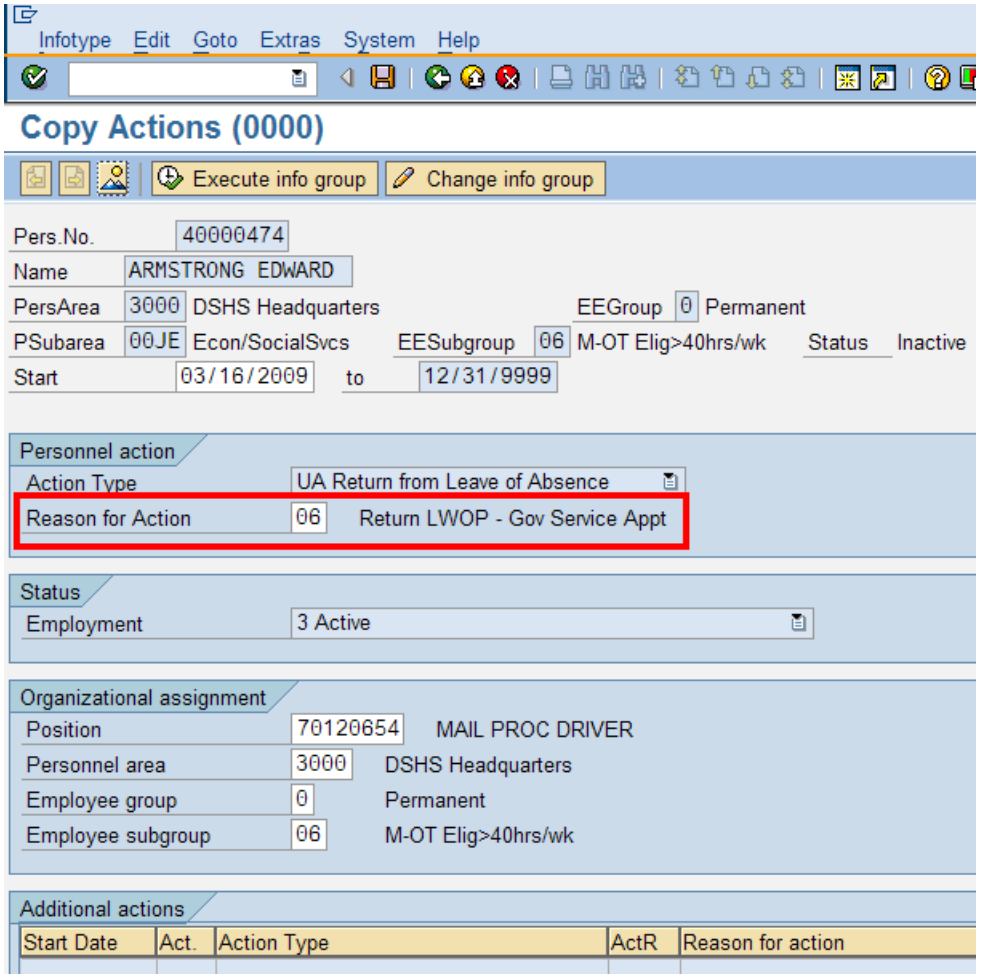
Return from Leave of Absence

- Fields to complete:
  - **From** (Enter the date the employee returns from leave)
  - **Personnel no.**
- To access the Return from Leave of Absence action, click the box to the left of Return from Leave of Absence.
- Click **(Execute)**.



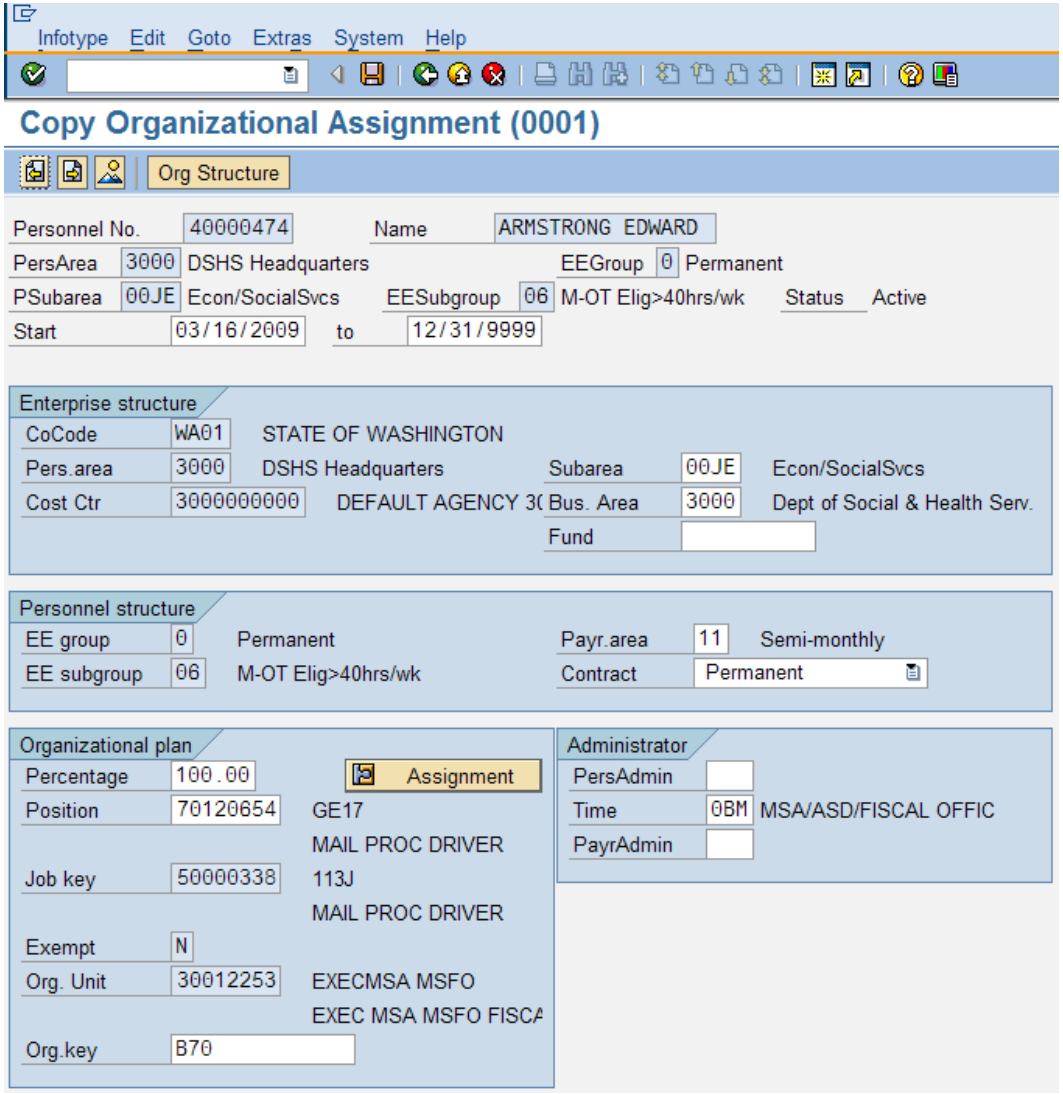
Actions (0000)

- Fields to complete:
  - **Reason for Action** (use matchcode)
- When finished, click **(Enter)** and then click **(Save)**.



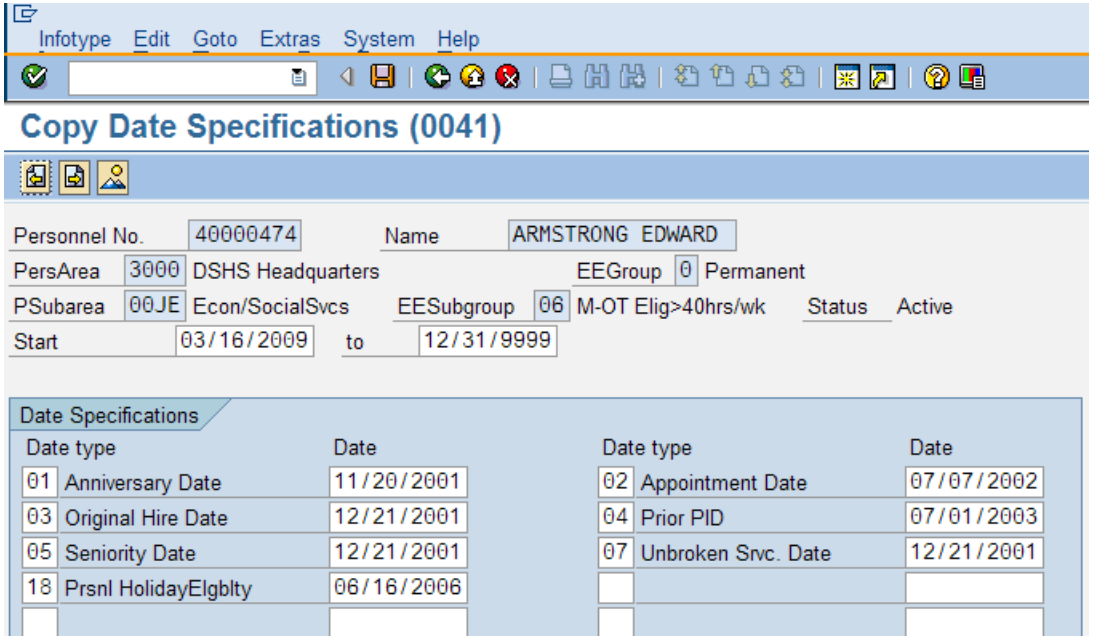
Organizational Assignment (0001)

- Verify the information is correct.
- When finished, click **(Enter)** and then click **(Save)**.
  - If no changes are made to the infotype, continue to save.



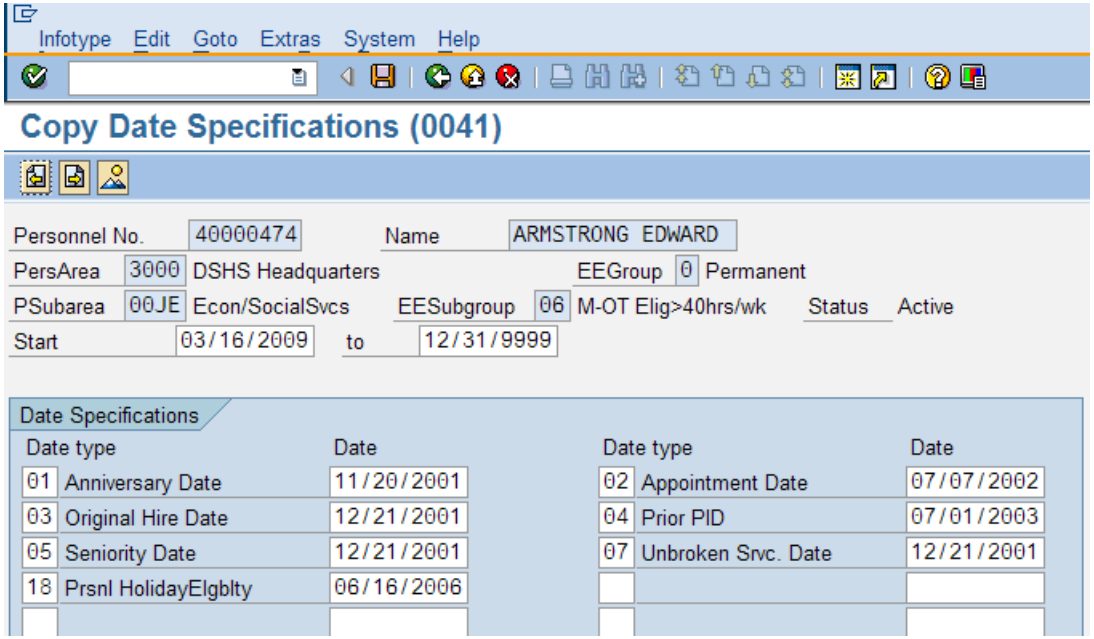
Date Specifications **(0041)**

- Date adjustments are not automatic in HRMS.
- When processing a return from Leave of Absence (Inactive), you may need to adjust the dates depending on the reason the employee was on Leave of Absence.
- Refer to the OLQR User Procedure, Date Specifications - Maintain.



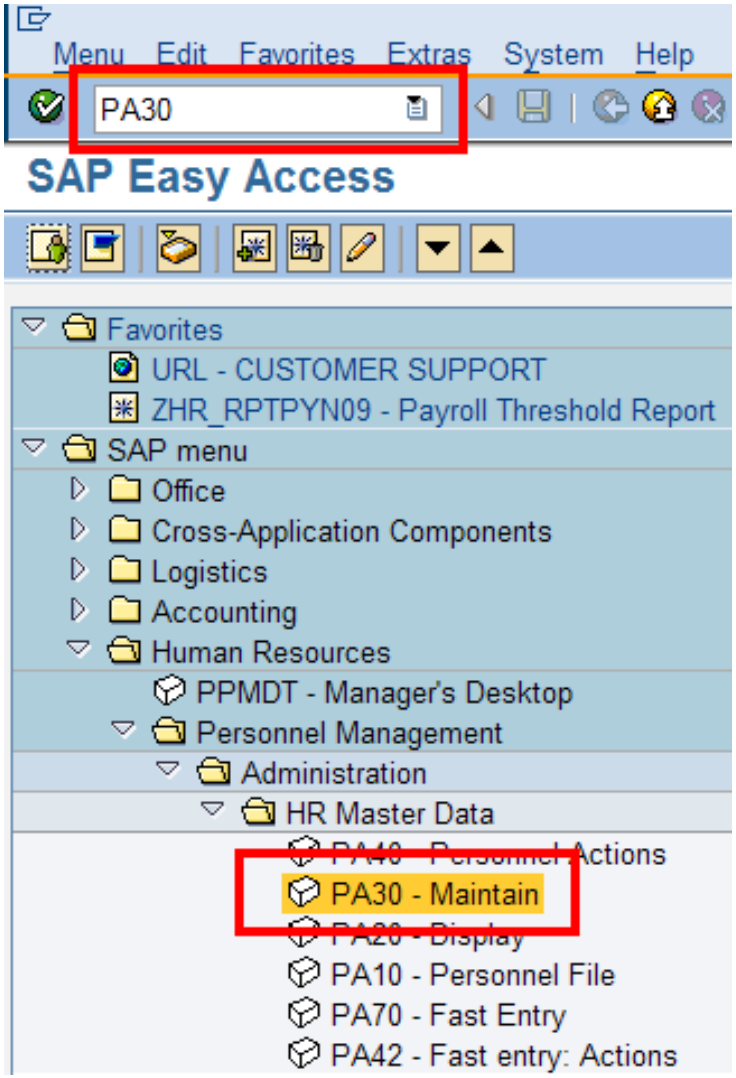
Date Specifications **(0041)**

- Key updates if needed or verify data.
- When finished, click **(Enter)** and then click **(Save)**.



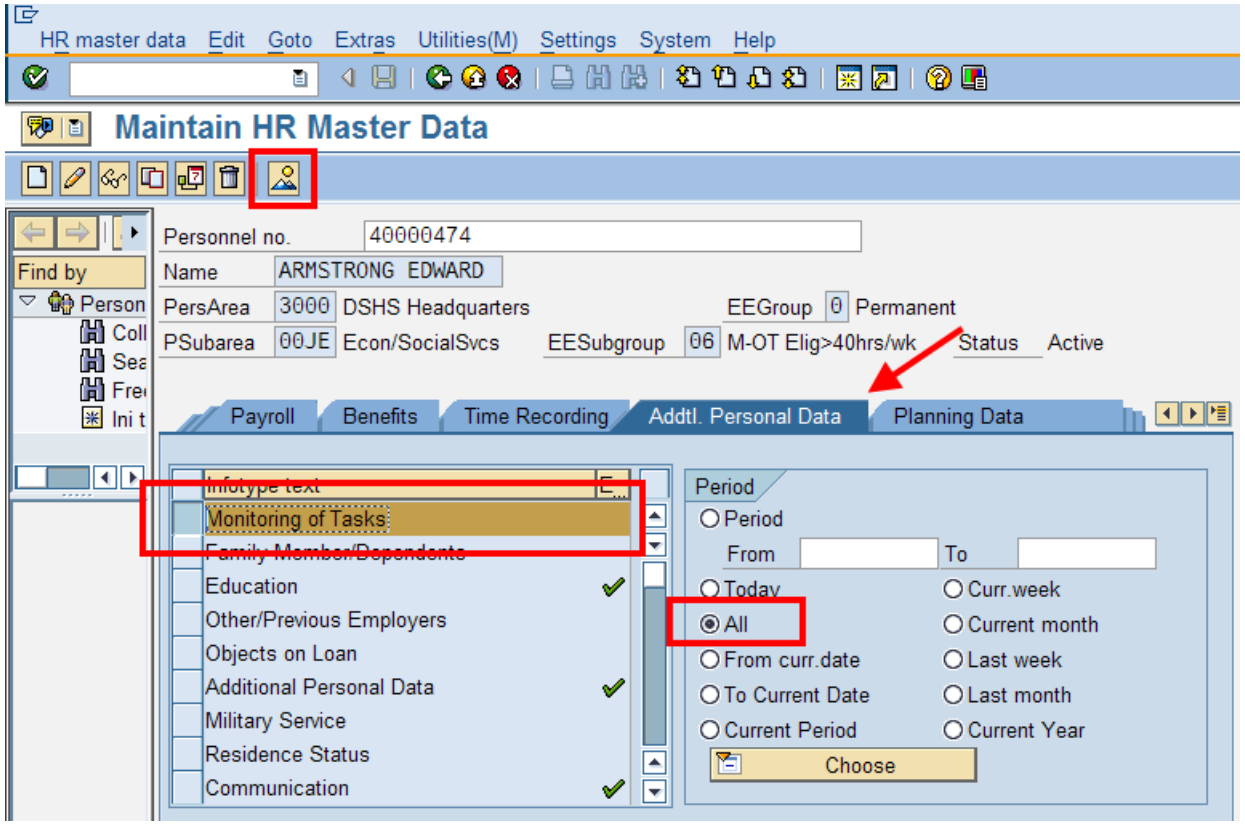
Monitoring of Task (0019)

- When the employee returns from Leave of Absence, the *Monitoring of Task* (0019) must be updated.
- To maintain the Monitoring of Task infotype:
  - Follow menu path: Human Resources → Personnel Management → Administration → HR Master Data → Maintain
  - Or enter transaction code **PA30** in the **Command** field



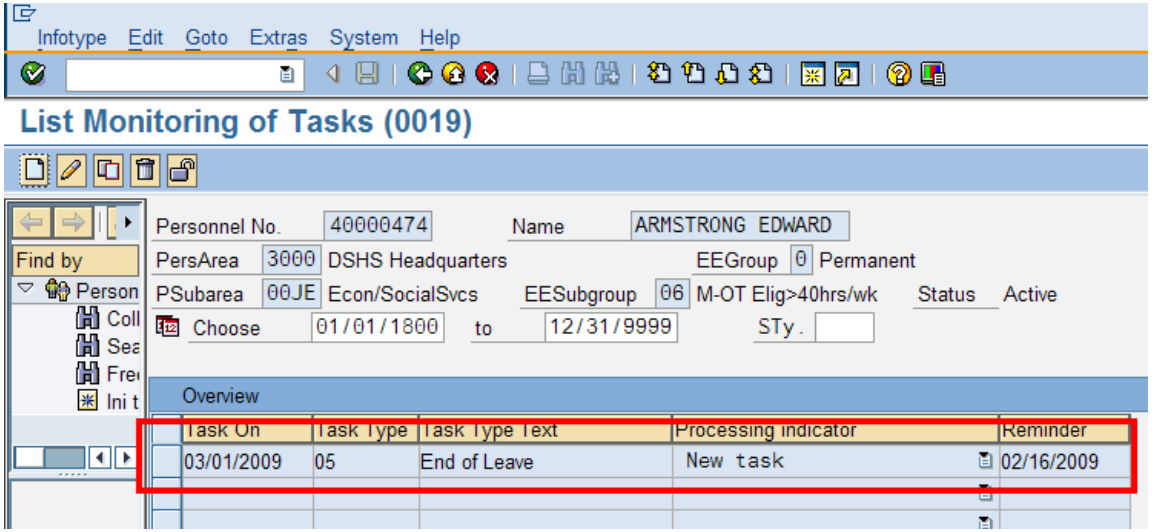
Maintain *Monitoring of Task* (0019)

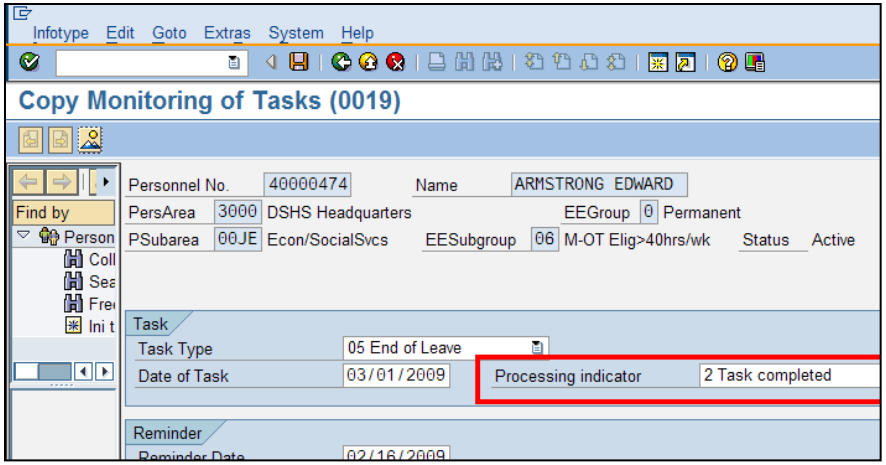
- Click the **Addtl. Personal Data** tab and click the box to the left of the *Monitoring of Task* (0019).
- In the 'Period' section, click (**All**).
- To view all records created, click (**Overview**).



Monitoring of Task (0019)

- Select the appropriate record
  - Task Type
    - End of Leave
- Click **(Change)**
- Fields to complete:
  - Date of Task
  - Processing indicator
    - Task Completed
- When finished, click **(Enter)** and then click **(Save)**





HRMS Activity

Process Return from Leave of Absence

Review Questions

- From the Personnel Actions screen, what date would you enter in the ‘From’ field when placing someone on Active/Inactive leave of absence?

- What infotype is not included in the dynamic action Return from Leave of Absence?

Separation

Separation Overview

Upon completion of this section you will be able to:

- Define the key terms and concepts associated with the Employee Separation action.
- Navigate through the Separation infotypes and understand the importance of the information in each infotype.
- Complete an Employee Separation action.

Separation

- A ***separation*** occurs when an employee discontinues his/her employment with the state of Washington.

- There are three main types of separations:
  - **Retirement** - A voluntary separation from employment with the state of Washington based on years of service and eligibility.
  - **Resignation** - A voluntary separation from employment with the state of Washington.
  - **Termination** - An involuntary separation from employment with the state of Washington.

Separation

- When an employee separates from state service his/her information is stored within HRMS using the assigned personnel number.
- Reports outlining separations are sent via an interface to Health Care Authority, Department of Retirement Systems and Unions as the separation occurs.
- Prior to starting the separation action, contact the Time and Attendance Processor to delete any future CAT entries after the separation date.

– You will not be able to continue the action with these entries in CATS.

- The employee's system status will be 'withdrawn'.

Processing a Separation

- To process an employee separation, you require either:
  - A letter from the employee indicating reason for separation and the effective date.
  - A letter from the appropriate appointing authority indicating reason for separation and effective date.

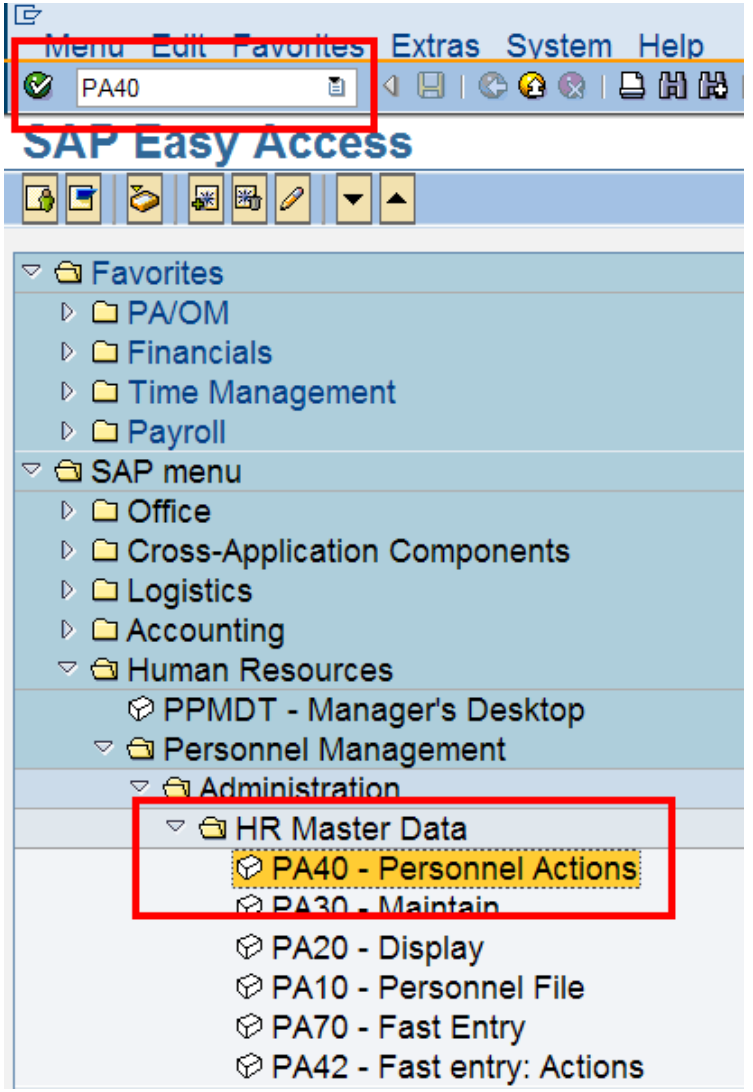
Note: Your agency may have other requirements. Please follow any agency specific guidelines.

Separation Action Infotypes

- Update the following infotypes during the Separation action including:
  - *Actions* (0000)
    - Create Vacancy
  - Communications (0150)

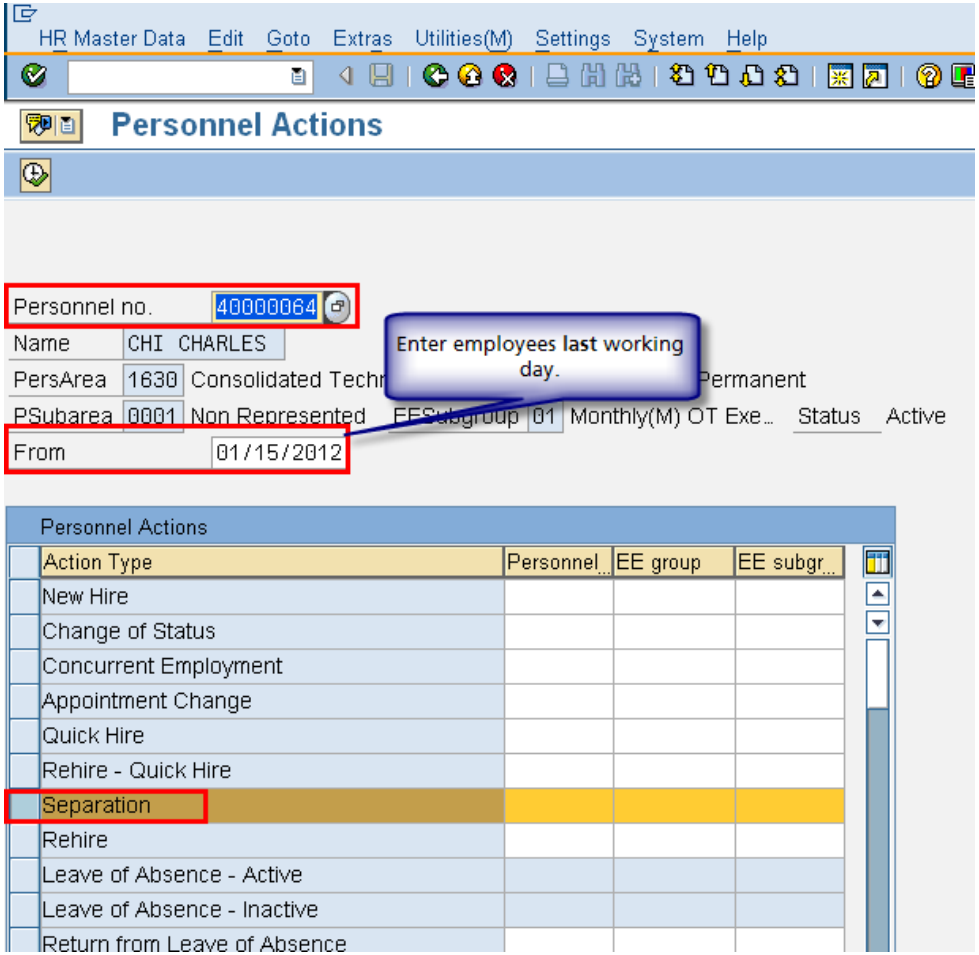
Separation Action

- To create a Separation Action using the menu path:
  - Follow Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions
  - Or enter transaction code **PA40** in the **Command** field



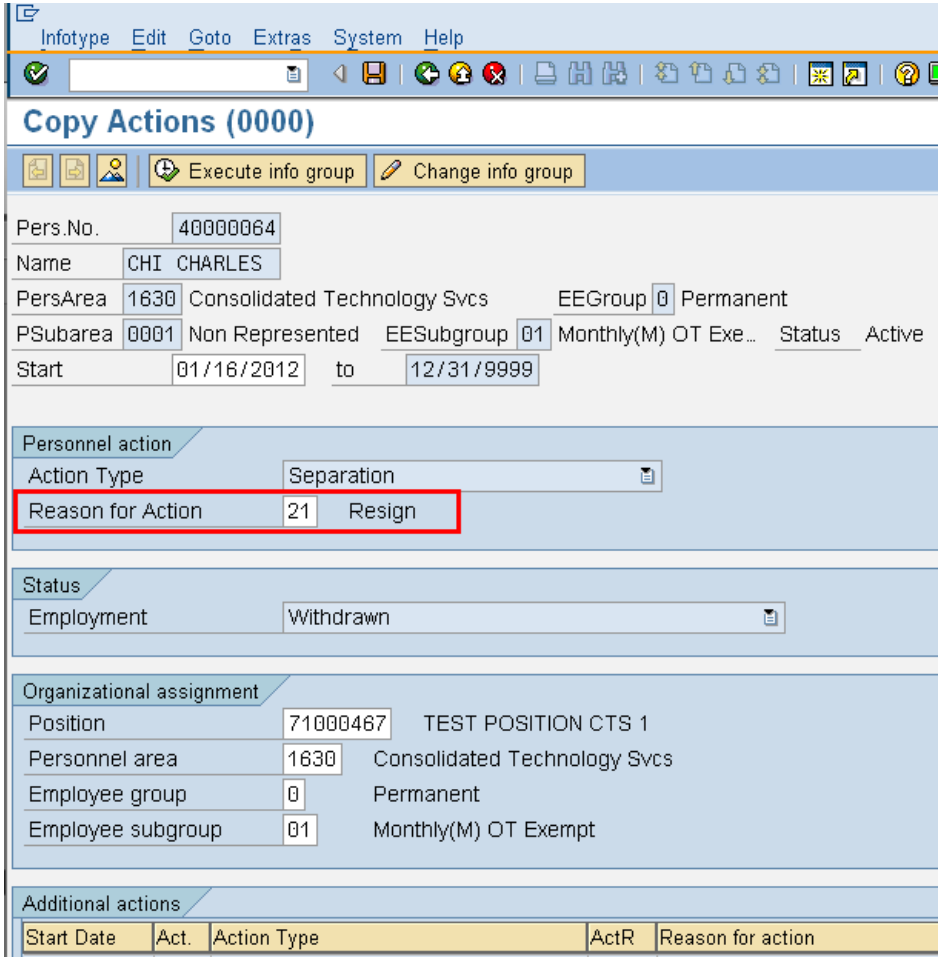
Separation Personnel Action

- Fields to complete:
  - **From** (Last working day in the office)
  - **Personnel no.**
- To access the Separation action, click the box to the left of Separation.
- Click **(Execute)**.



Actions **(0000)**

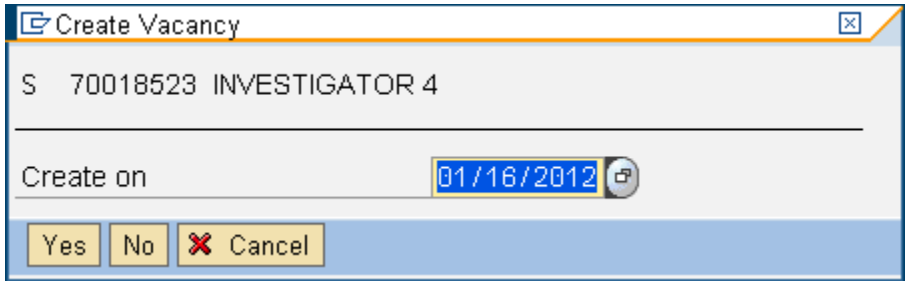
- Fields to complete
  - **Reason for Action** (use drop down)
- When finished, click **(Enter)** and then click **(Save)**.



Note: The system has added a day to the Start date. The start date is the first day the employee is separated from state service. Also the Employment status now reads ‘withdrawn’.

Create Vacancy

- Upon saving the *Actions* infotype (0000), a Create Vacancy pop-up window will appear. This information is stored in the *Position Vacancy* infotype in Organizational Management.
- Click 'Yes' to Create the vacancy.
- Click 'No' if the position is multi-filled.

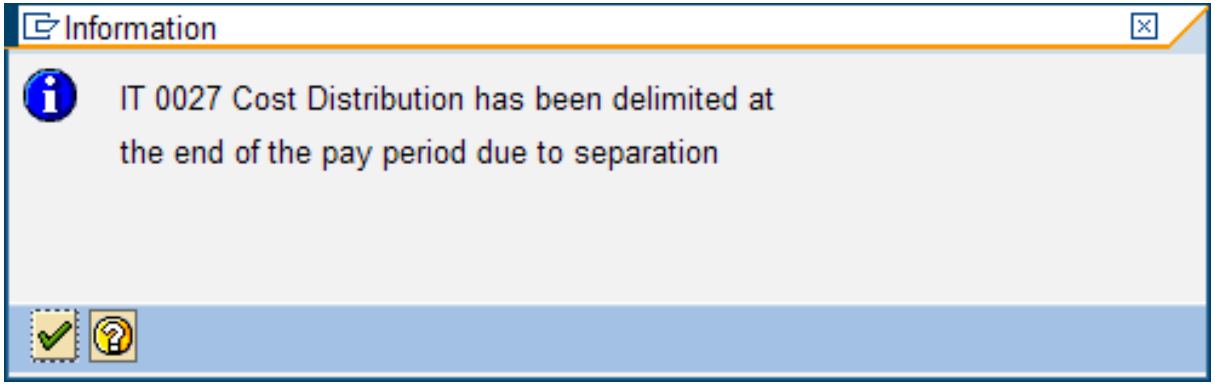


Note: If the position is multi-filled select 'No'.

After creating the vacancy, click (**Exit**) to exit the action.

Delimiting *Cost Distribution* (0027)

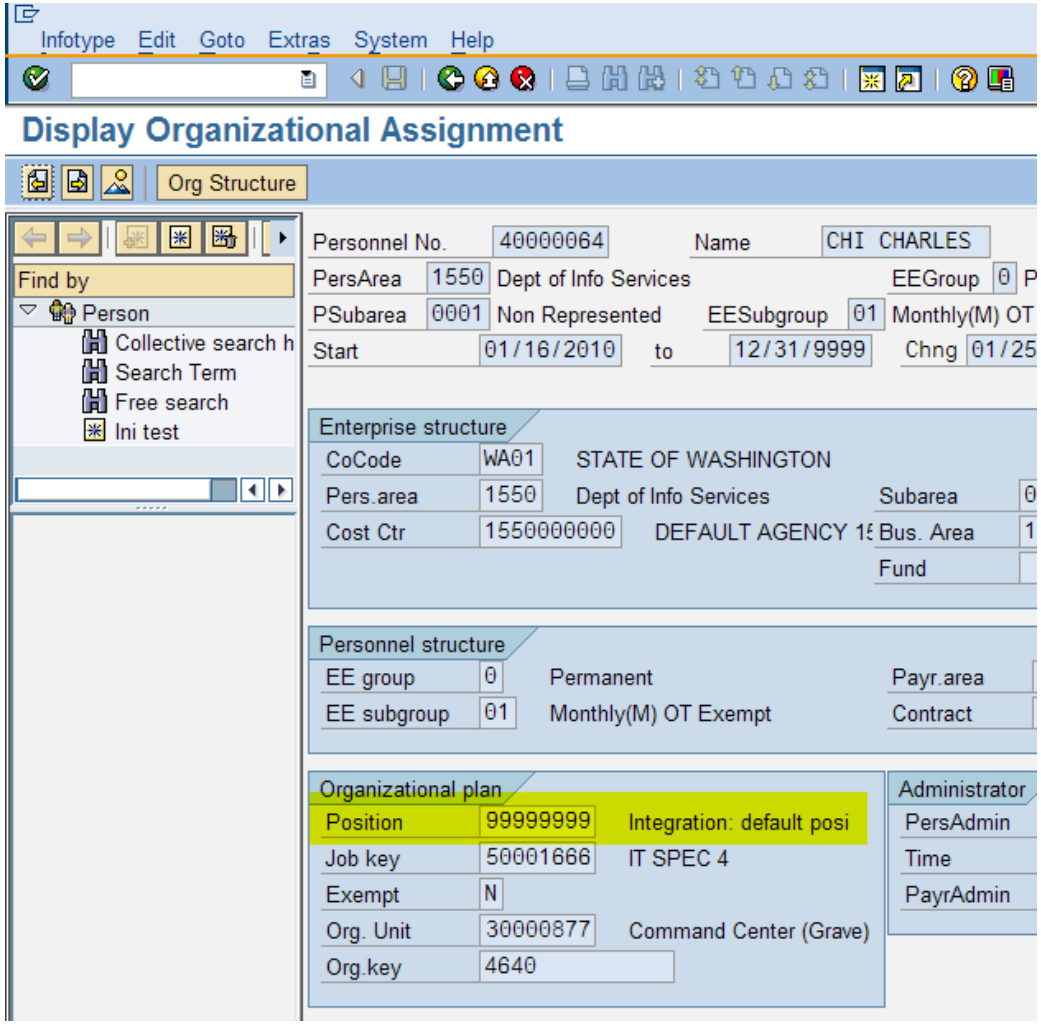
- For Employees who have an existing *Cost Distribution* (0027) established, the system will automatically delimit the infotype ending the last day of the pay period.



Note: This will not appear for every employee.

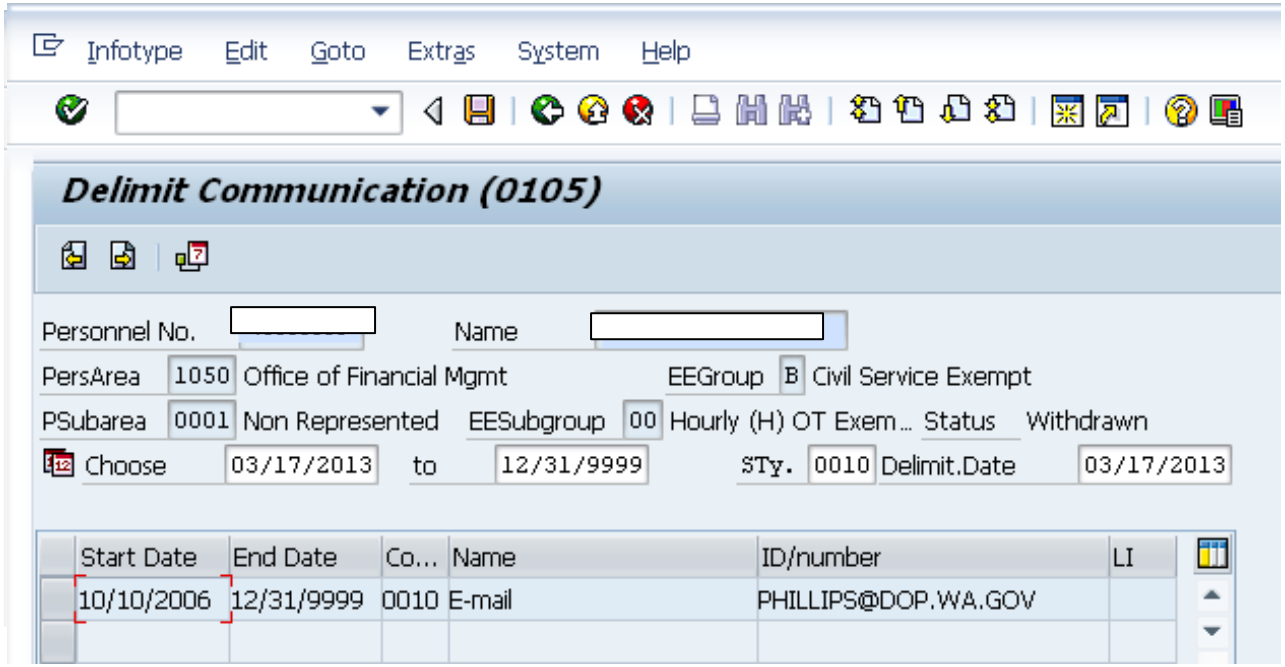
Organizational Assignment (0001)

Note: The position number located in *Organizational Assignment* (0001) will automatically change to 99999999 (system's position default) on a Separation action. **Do not** change this number back to the appointment position number. This information will be available in the infotype's history.



Communications (0105)

- The **delimit** communications infotype is used to delimit the email address to be used.
- Select the box to left of the email address to select.
- Press (Delimit).



After saving, click (**Exit**) to exit the action.

Personnel Administration / Payroll Handoff

- After personnel updates are made to the employee's information, the employee information is transferred to the Payroll Processor.

- After the separation, the employee's personnel number remains exclusive to their file.

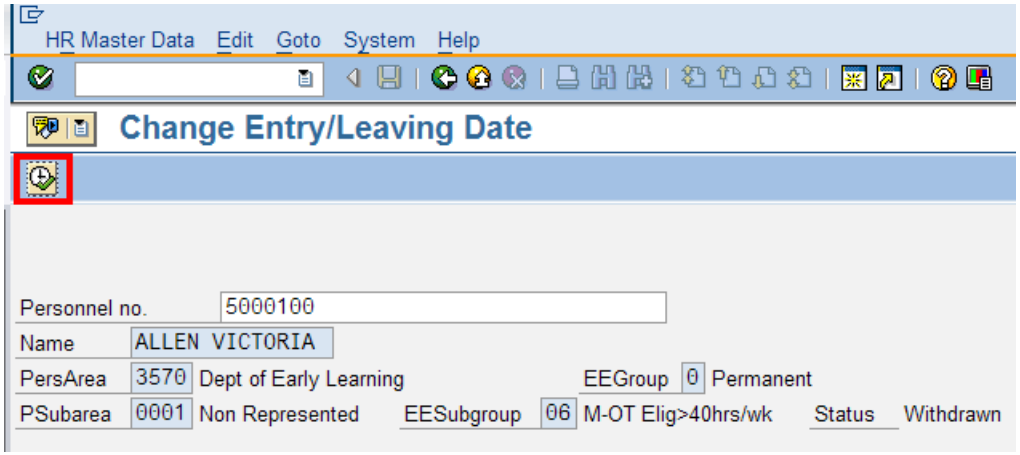
For example: If John retires in 2009 and decides to return to employment in 2015, his personnel number from his last employment is still valid and will identify his record in 2015. When John returns back to state employment, he will be considered a *Rehire*.

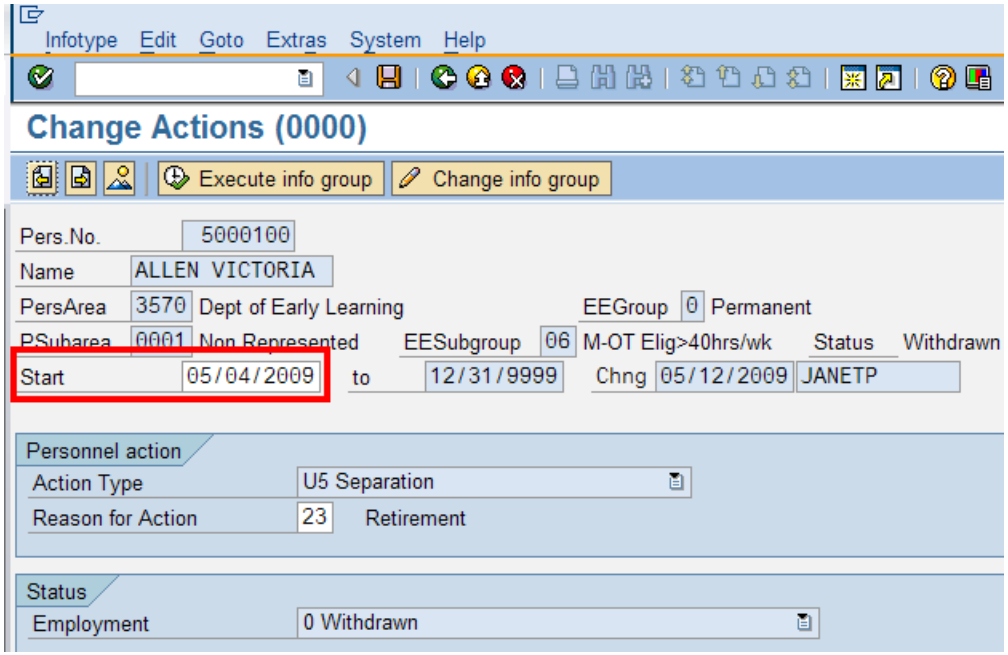
HRMS Activity

Process Employee Separation

Change Leaving Date – Separation

- To change the employee's leaving date after the separation action has been completed, use the Change Entry/Leaving Date transaction **PA41**.
- Click (**Execute**).
- Enter new date in **Start** field, click (**Enter**) and then click (**Save**).

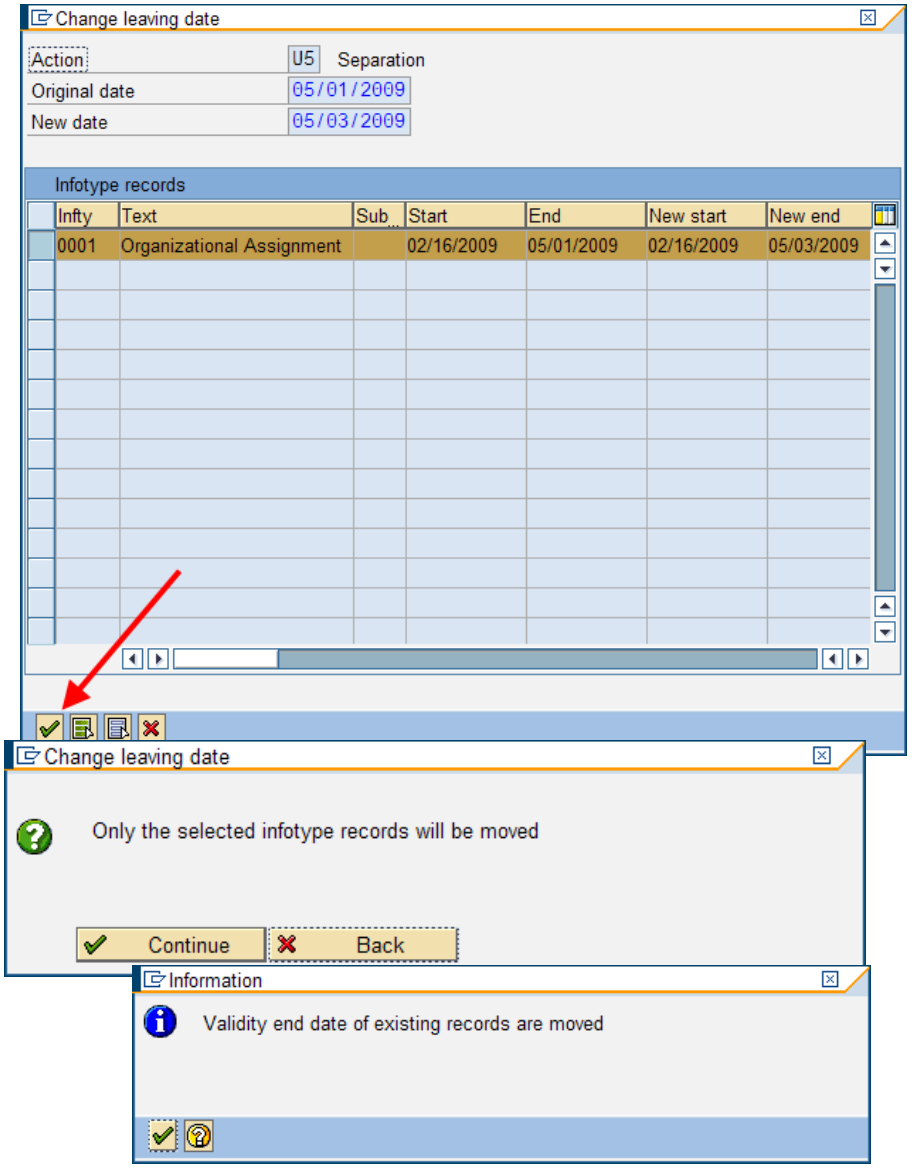




Change Leaving Date – Separation

- Select all infotypes that will need to be changed.
- Click **(Continue (Enter))**.
- Postpone action dialog will appear, click **(Continue)**.
- Information dialog will appear, click **(Continue)**.

See OLQR User Procedure, Separation Action – Change Leaving Date for more information.



Personnel Administration Reports

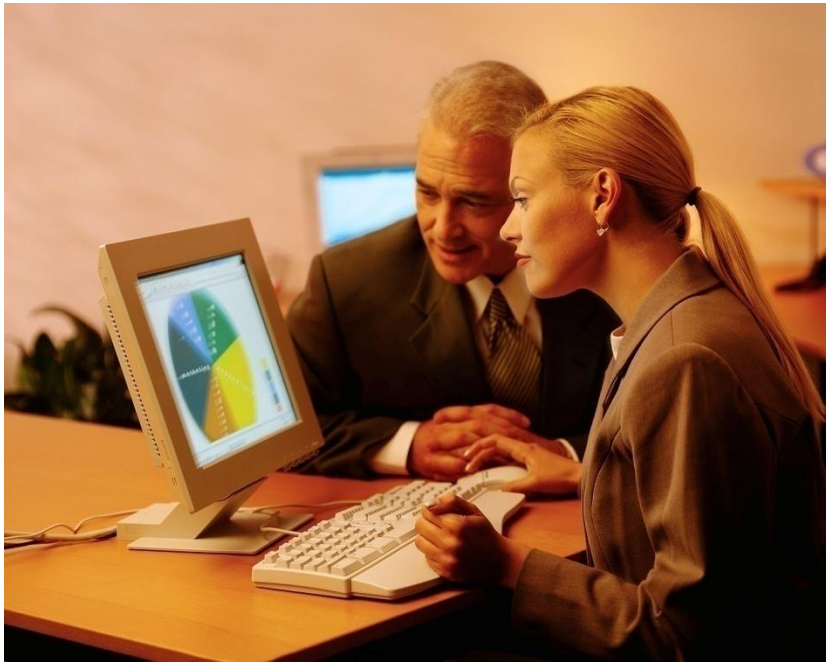
Personnel Administration Reports

Upon completion of this section you will be able to:

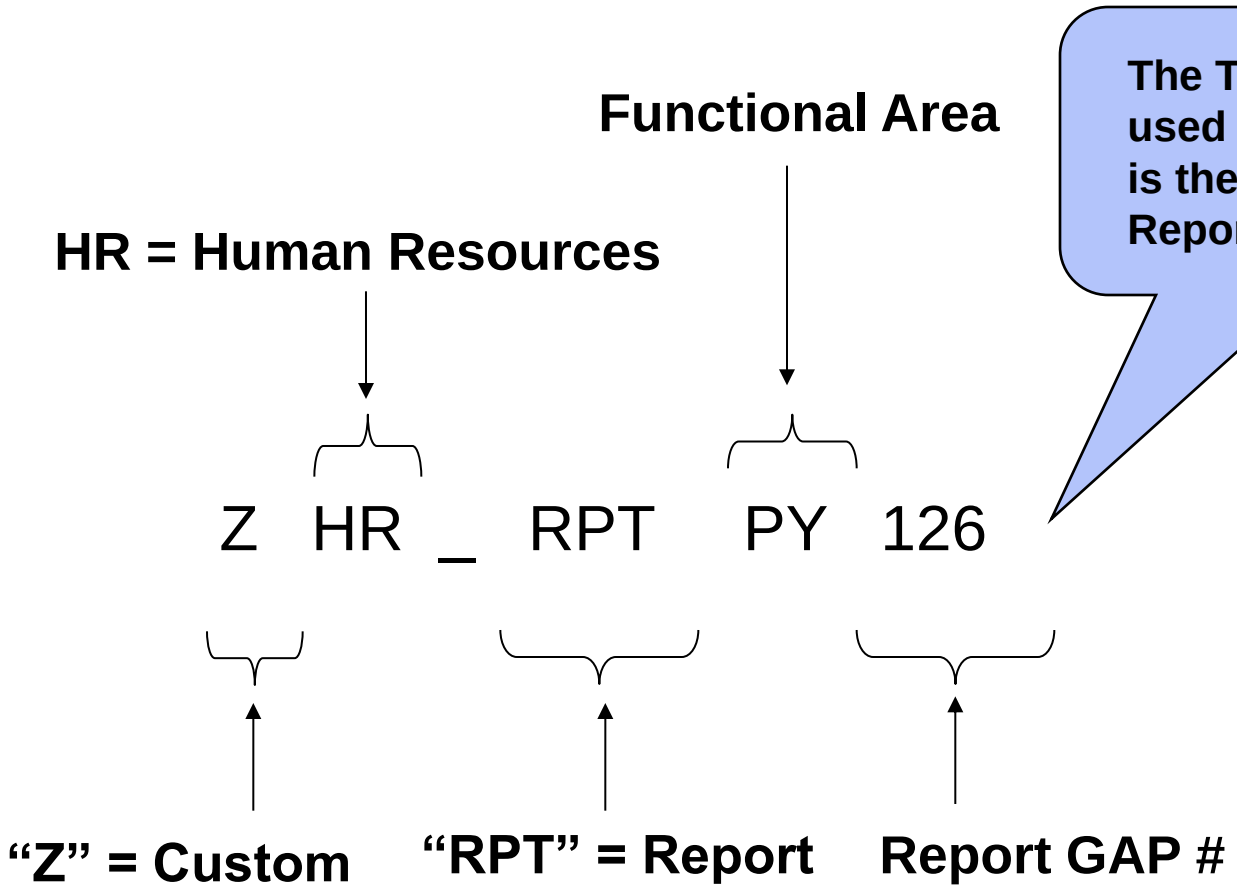
Learn the basic components of running reports needed to complete Personnel Administration tasks.

Reporting in HRMS

- HRMS integration provides the capability to run reports within Personnel Areas (agencies or sub-agencies).
- Generating reports allows you to process information quickly to support decision making.
- Ability to export and manipulate “real-time” data.



HRMS Customized Reporting - Transaction Code Map



The Transaction Code used for this example is the Payroll Posting Report.

Functional Areas:

PY – Payroll

PA – Personnel Administration

OM – Organizational Management

TM – Time Management

BN - Benefits

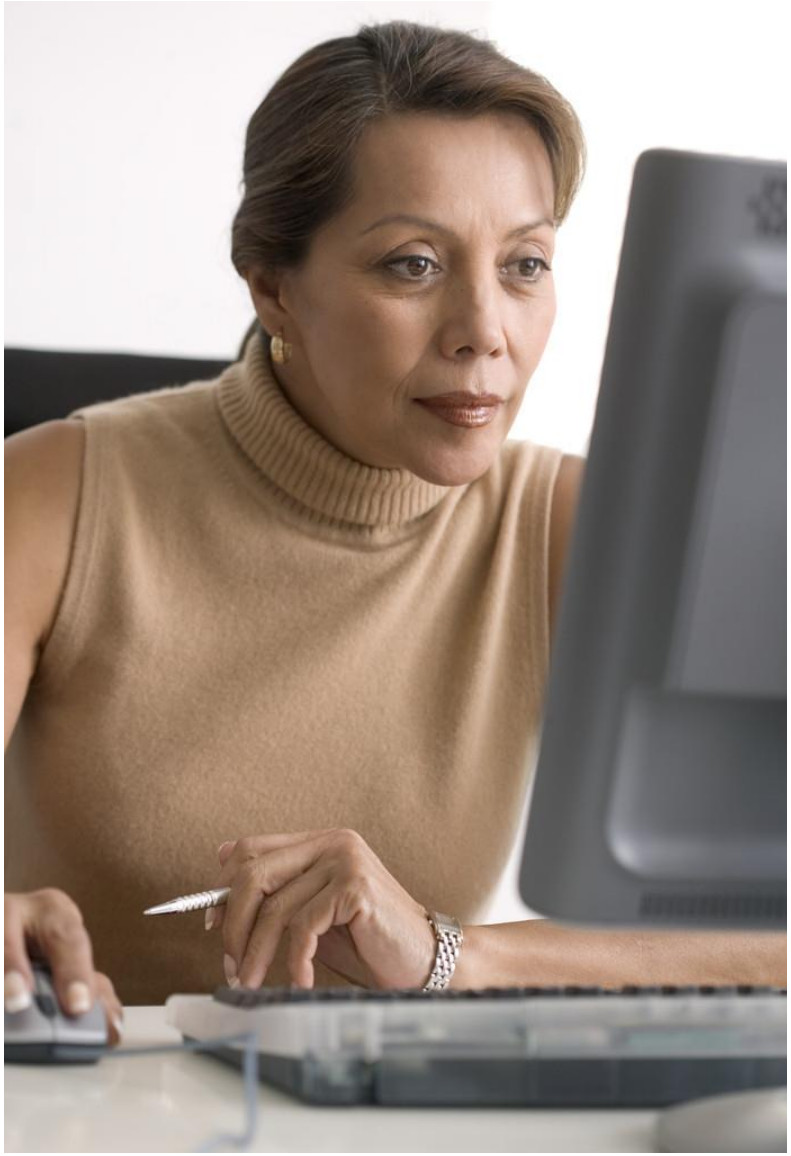
HRMS Reporting resources

Visit the OLQR website (http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference/) for the following:

- HRMS Reports
  - Variants_Create and Retrieve
- Job Aids A-Z

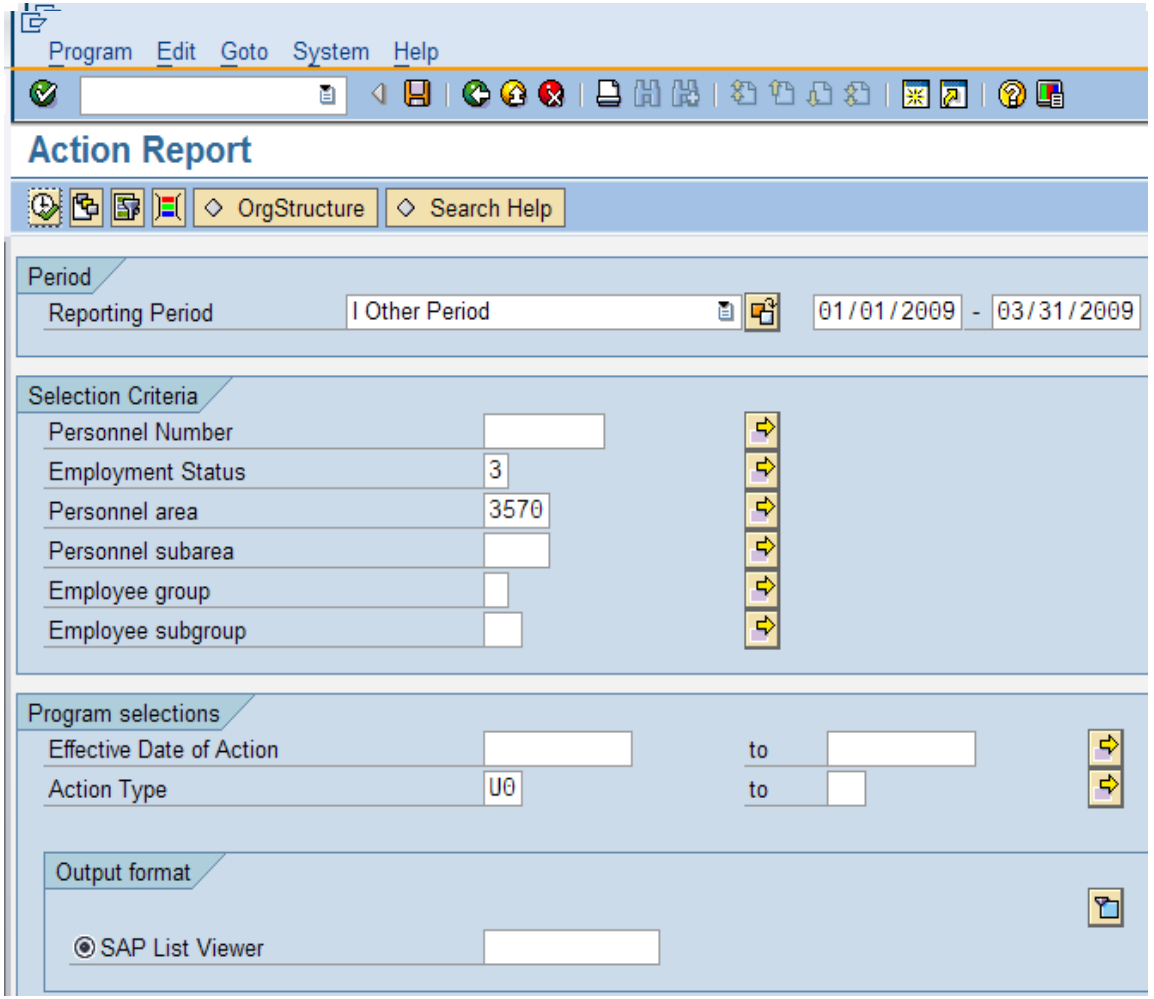
Actions Report

- Used to identify new hires, transfers and/or separations within the organization.
- Run the report when analysis on new hires is needed.
- Access the report using the transaction code **ZHR_RPTPA457**.

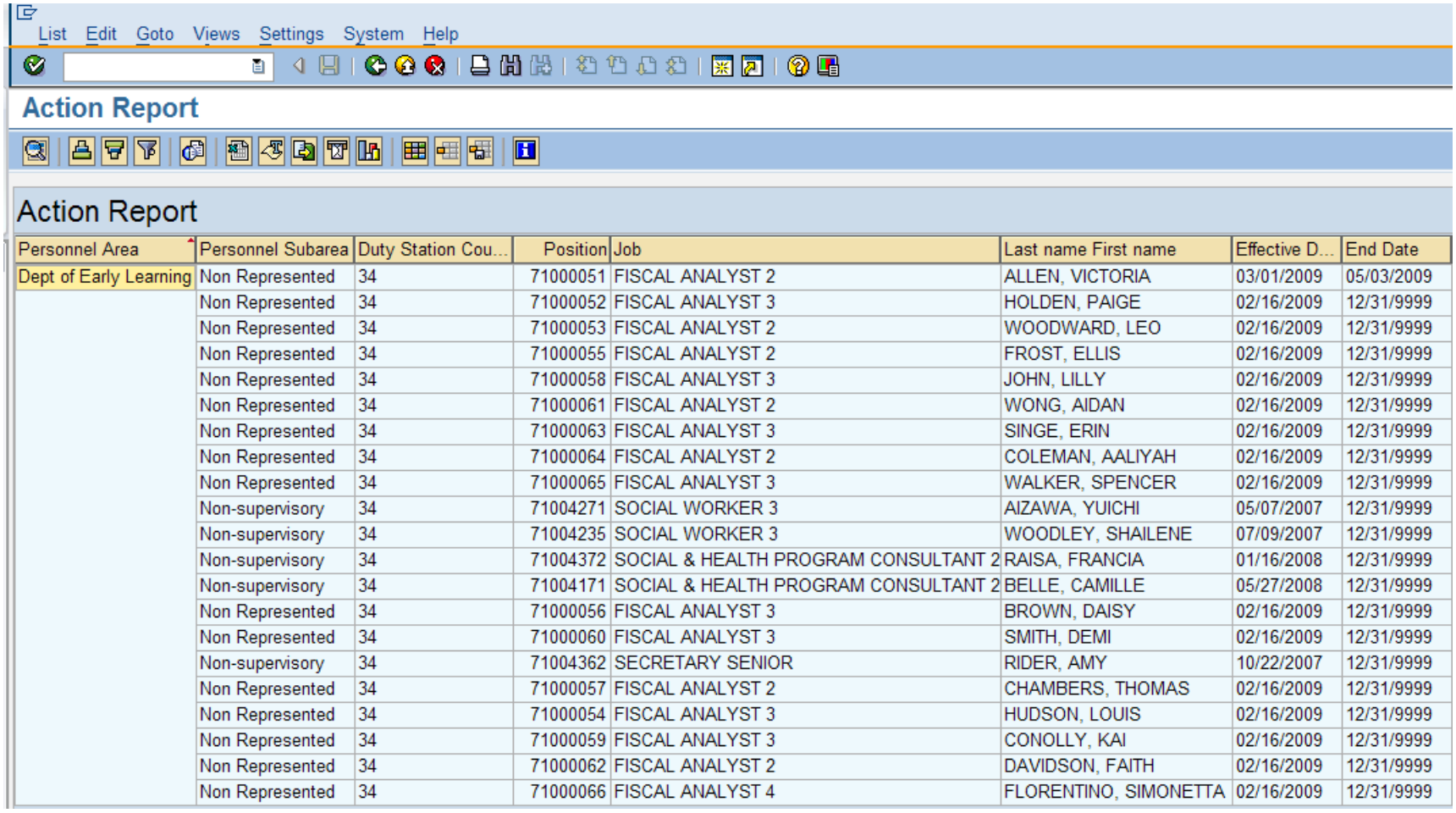


Actions Report

- Select a Reporting Period as required
- Selection Criteria include the following conditional fields:
  - **Personnel Number**
  - **Employment Status**
  - **Personnel area**
- Enter the conditional Program selections
  - **Effective Date of Action**
  - **Action Type**
- Click **(Execute)**

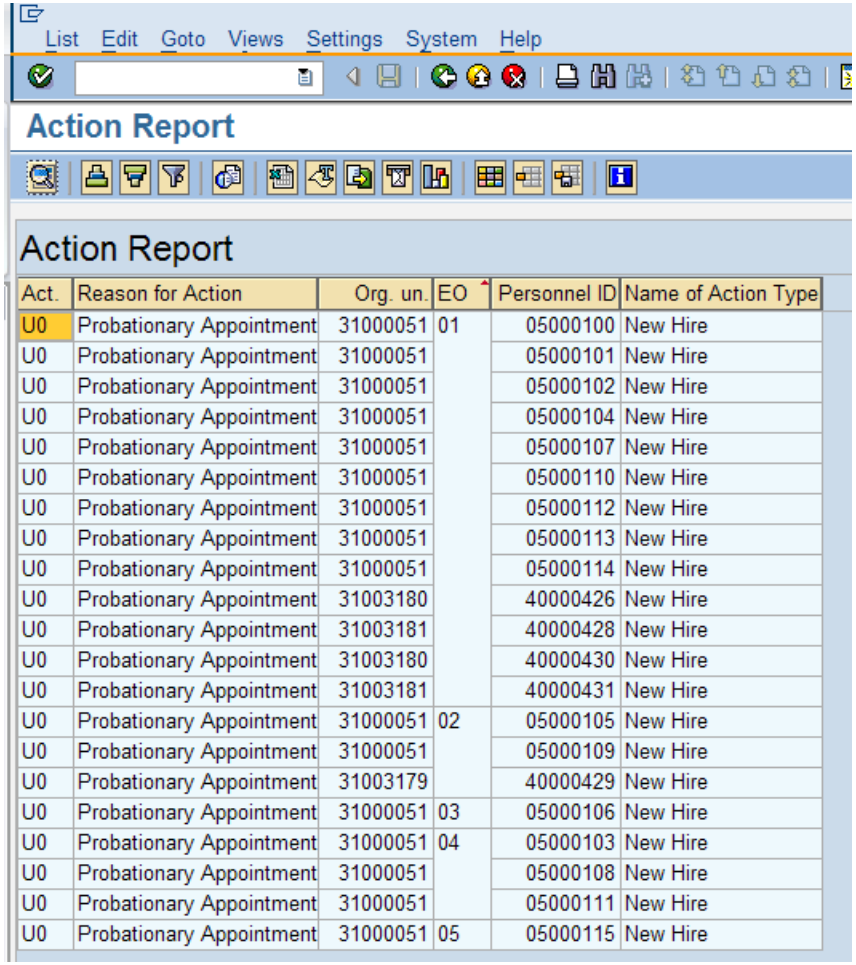


Viewing Results: Actions Report



Personnel Area	Personnel Subarea	Duty Station Cou...	Position	Job	Last name First name	Effective D...	End Date
Dept of Early Learning	Non Represented	34	71000051	FISCAL ANALYST 2	ALLEN, VICTORIA	03/01/2009	05/03/2009
	Non Represented	34	71000052	FISCAL ANALYST 3	HOLDEN, PAIGE	02/16/2009	12/31/9999
	Non Represented	34	71000053	FISCAL ANALYST 2	WOODWARD, LEO	02/16/2009	12/31/9999
	Non Represented	34	71000055	FISCAL ANALYST 2	FROST, ELLIS	02/16/2009	12/31/9999
	Non Represented	34	71000058	FISCAL ANALYST 3	JOHN, LILLY	02/16/2009	12/31/9999
	Non Represented	34	71000061	FISCAL ANALYST 2	WONG, AIDAN	02/16/2009	12/31/9999
	Non Represented	34	71000063	FISCAL ANALYST 3	SINGE, ERIN	02/16/2009	12/31/9999
	Non Represented	34	71000064	FISCAL ANALYST 2	COLEMAN, AALIYAH	02/16/2009	12/31/9999
	Non Represented	34	71000065	FISCAL ANALYST 3	WALKER, SPENCER	02/16/2009	12/31/9999
	Non-supervisory	34	71004271	SOCIAL WORKER 3	AIZAWA, YUICHI	05/07/2007	12/31/9999
	Non-supervisory	34	71004235	SOCIAL WORKER 3	WOODLEY, SHAILENE	07/09/2007	12/31/9999
	Non-supervisory	34	71004372	SOCIAL & HEALTH PROGRAM CONSULTANT 2	RAISA, FRANCIA	01/16/2008	12/31/9999
	Non-supervisory	34	71004171	SOCIAL & HEALTH PROGRAM CONSULTANT 2	BELLE, CAMILLE	05/27/2008	12/31/9999
	Non Represented	34	71000056	FISCAL ANALYST 3	BROWN, DAISY	02/16/2009	12/31/9999
	Non Represented	34	71000060	FISCAL ANALYST 3	SMITH, DEMI	02/16/2009	12/31/9999
	Non-supervisory	34	71004362	SECRETARY SENIOR	RIDER, AMY	10/22/2007	12/31/9999
	Non Represented	34	71000057	FISCAL ANALYST 2	CHAMBERS, THOMAS	02/16/2009	12/31/9999
	Non Represented	34	71000054	FISCAL ANALYST 3	HUDSON, LOUIS	02/16/2009	12/31/9999
	Non Represented	34	71000059	FISCAL ANALYST 3	CONOLLY, KAI	02/16/2009	12/31/9999
	Non Represented	34	71000062	FISCAL ANALYST 2	DAVIDSON, FAITH	02/16/2009	12/31/9999
	Non Represented	34	71000066	FISCAL ANALYST 4	FLORENTINO, SIMONETTA	02/16/2009	12/31/9999

Viewing Results: Actions Report – cont'd



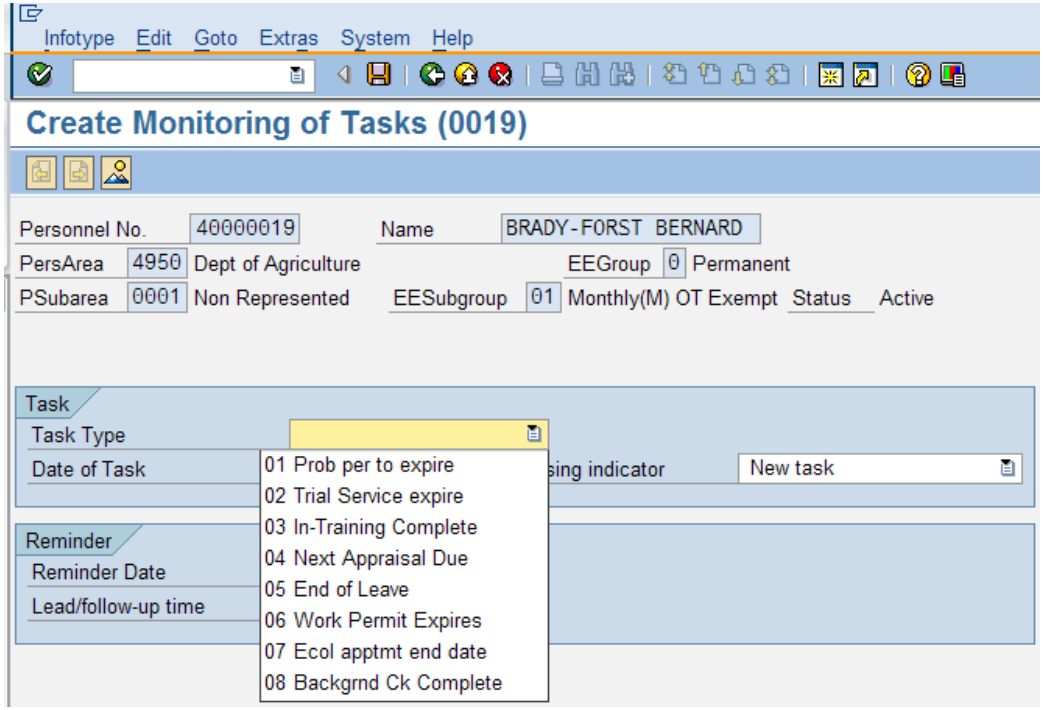
Act.	Reason for Action	Org. un.	EO	Personnel ID	Name of Action Type
U0	Probationary Appointment	31000051	01	05000100	New Hire
U0	Probationary Appointment	31000051		05000101	New Hire
U0	Probationary Appointment	31000051		05000102	New Hire
U0	Probationary Appointment	31000051		05000104	New Hire
U0	Probationary Appointment	31000051		05000107	New Hire
U0	Probationary Appointment	31000051		05000110	New Hire
U0	Probationary Appointment	31000051		05000112	New Hire
U0	Probationary Appointment	31000051		05000113	New Hire
U0	Probationary Appointment	31000051		05000114	New Hire
U0	Probationary Appointment	31003180		40000426	New Hire
U0	Probationary Appointment	31003181		40000428	New Hire
U0	Probationary Appointment	31003180		40000430	New Hire
U0	Probationary Appointment	31003181		40000431	New Hire
U0	Probationary Appointment	31000051	02	05000105	New Hire
U0	Probationary Appointment	31000051		05000109	New Hire
U0	Probationary Appointment	31003179		40000429	New Hire
U0	Probationary Appointment	31000051	03	05000106	New Hire
U0	Probationary Appointment	31000051	04	05000103	New Hire
U0	Probationary Appointment	31000051		05000108	New Hire
U0	Probationary Appointment	31000051		05000111	New Hire
U0	Probationary Appointment	31000051	05	05000115	New Hire

HRMS Activity

Action Report – ZHR_RPTPA457

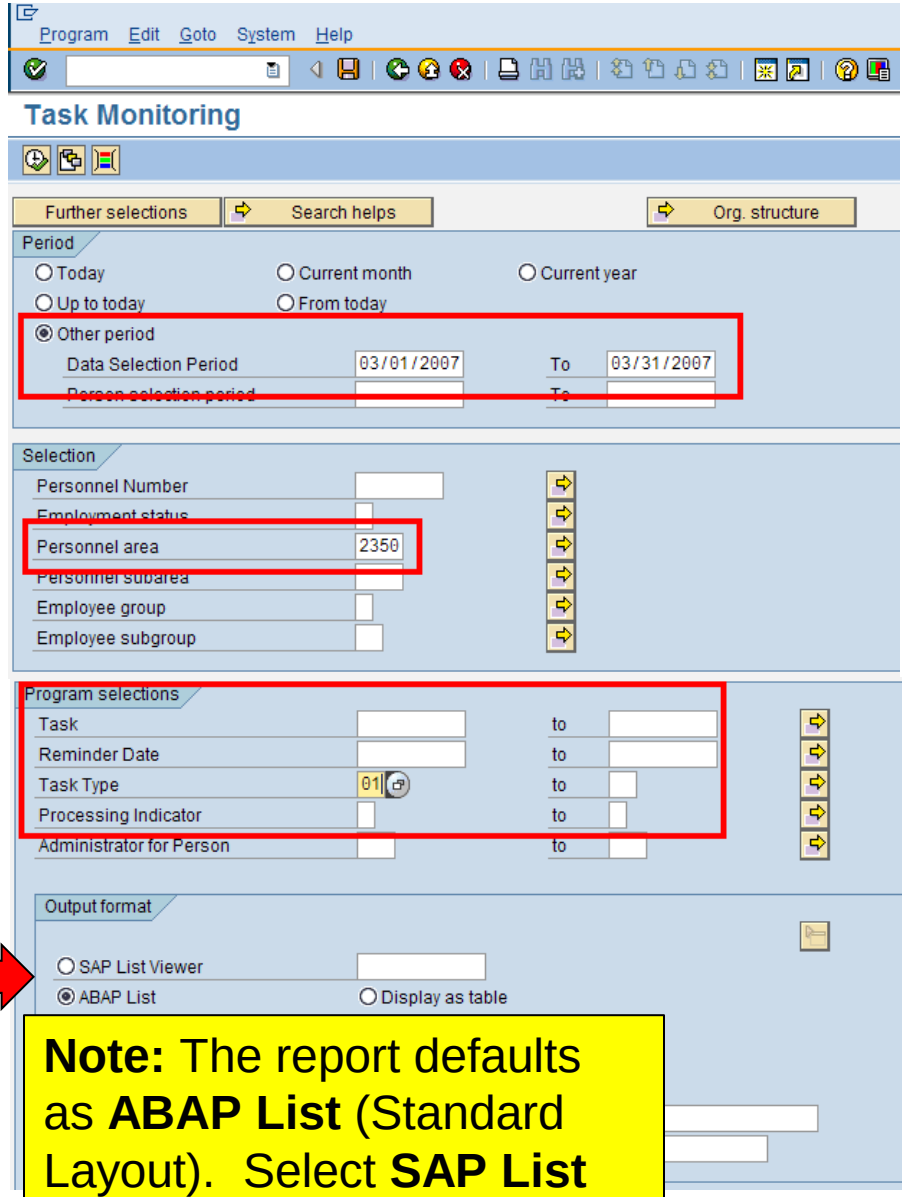
Task Monitoring Report

- The Task Monitoring Report identifies what tasks have been created on the *Monitoring of Task* infotype (0019).
- Run the report when analyzing tasks created for a specific period or due to expire.
  - Example: Identify employees who probation period or trial service is to end.
- Access the Task Monitoring Report using the transaction code **S_PH0_48000450**.



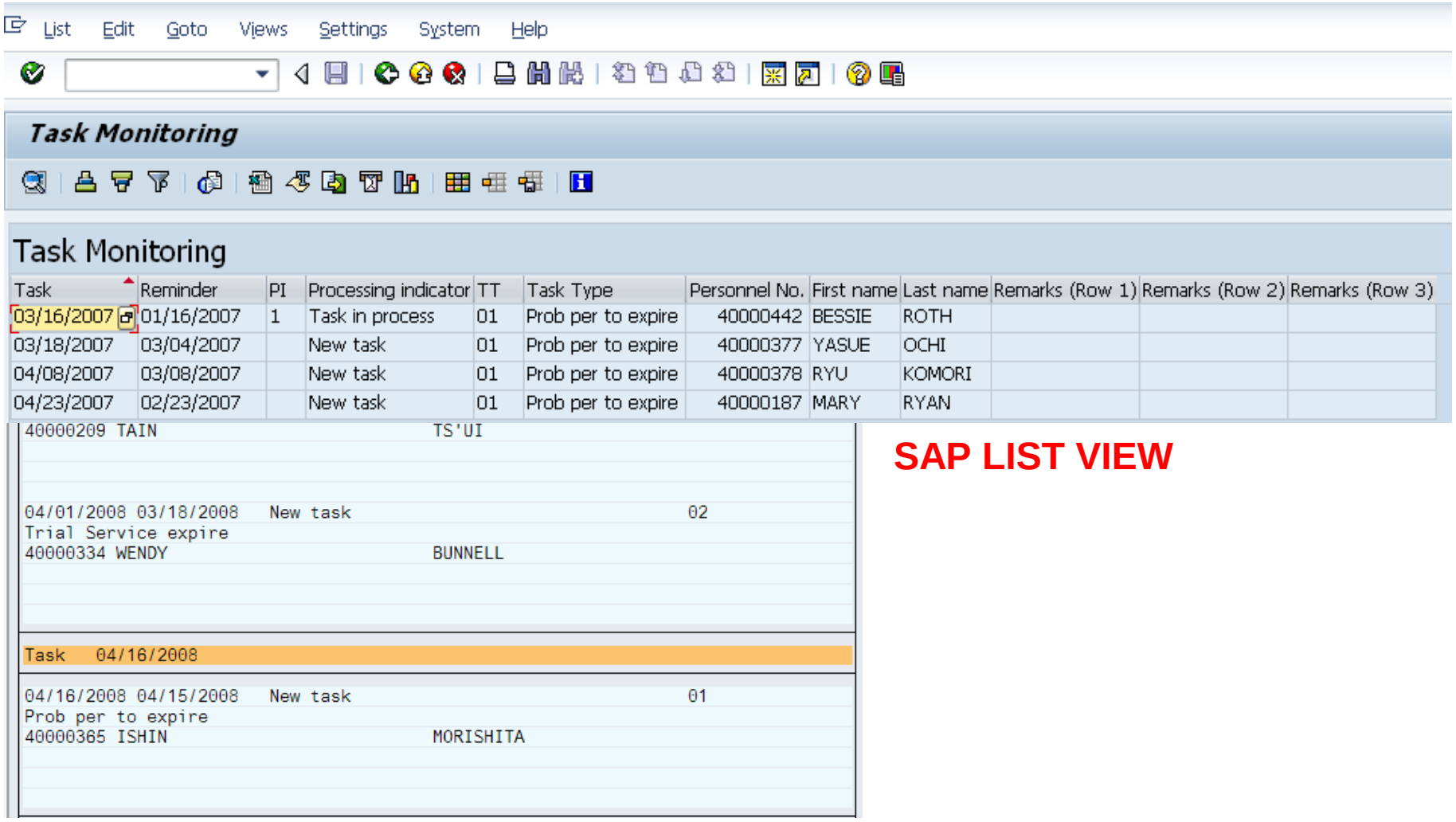
Task Monitoring

- As required, enter or select a Period
- Conditional Selection criteria include:
  - **Personnel Number**
  - **Employment status**
  - **Personnel area**
  - **Task**
  - **Reminder Date**
  - **Processing Indicator**
- When finished, click **(Execute)**.



Note: The report defaults as **ABAP List** (Standard Layout). Select **SAP List Viewer (ALV).**

Viewing Results: Task Monitoring



SAP LIST VIEW

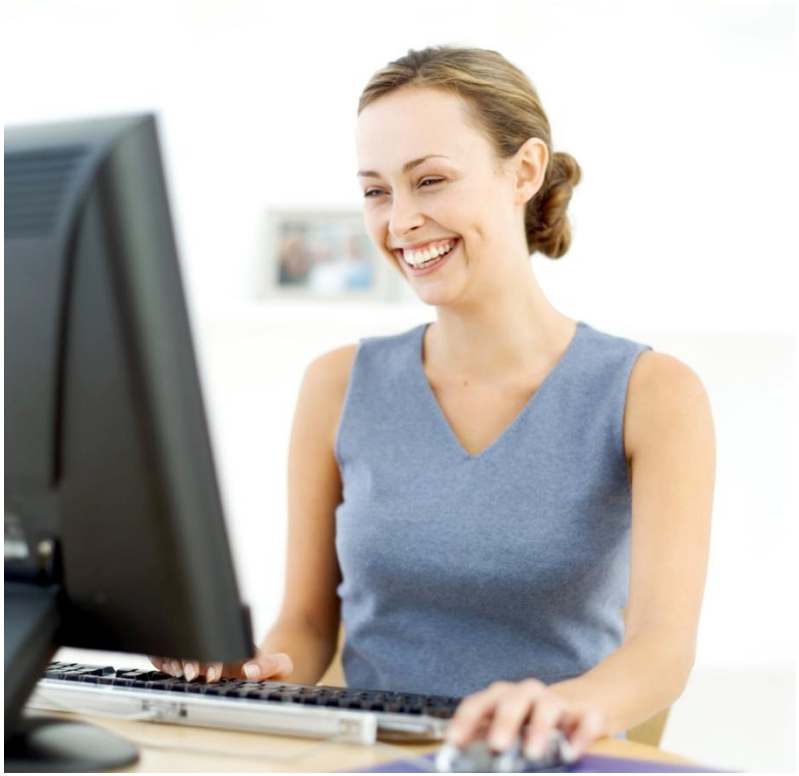
ABAP LIST VIEW

HRMS Activity

Task Monitoring – S_PH0_48000450

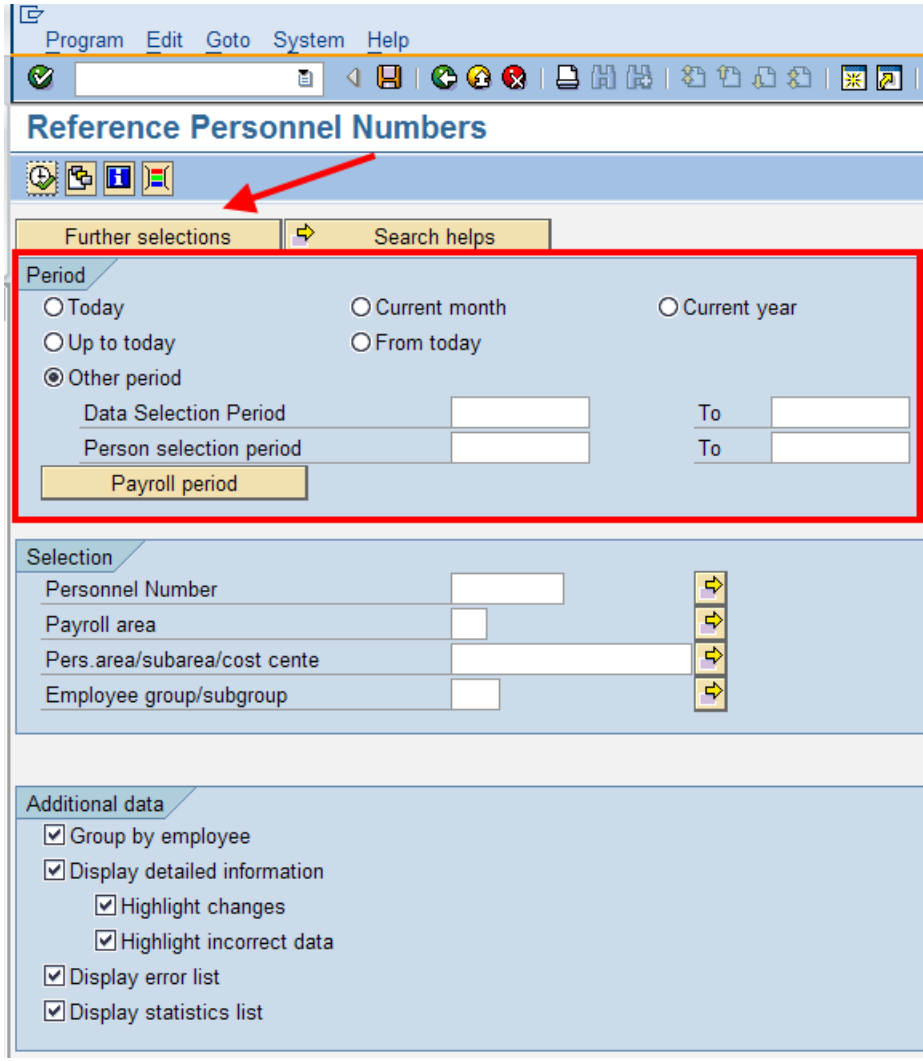
Reference Personnel Numbers

- Used to identify employees in the personnel area that have a Reference Personnel Number (two or more personnel numbers) created in HRMS.
- Run the report when analysis on Reference Personnel Numbers is needed.
- Access the report using the transaction code **S_AHR_61016358**.



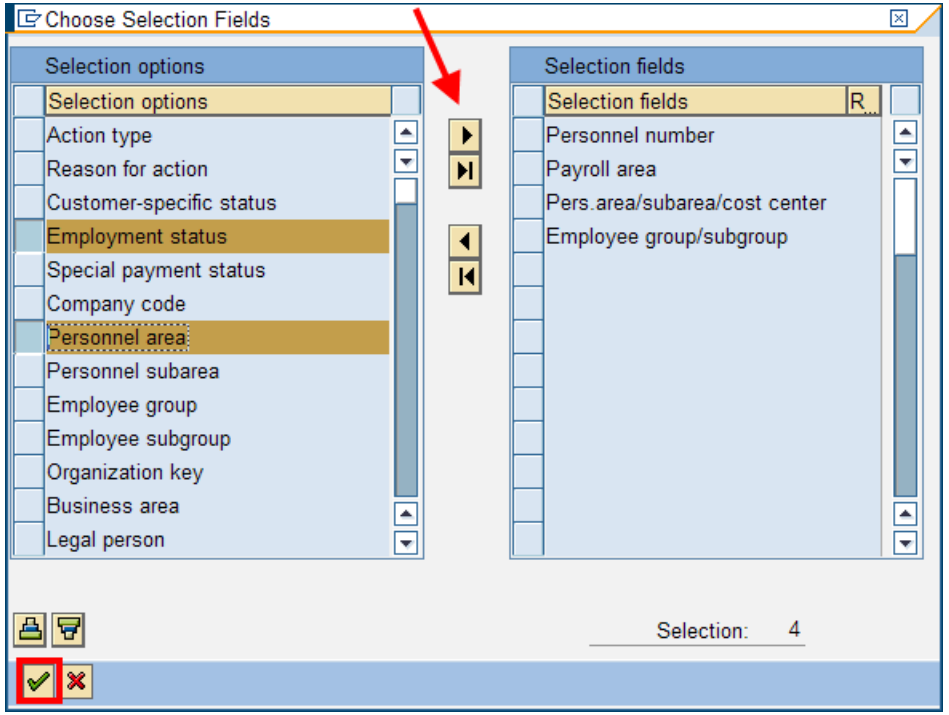
Reference Personnel Numbers

- As required, enter the Period
- To add additional Selection fields click on the Further Selection option (Personnel Area and Employment Status is currently not displayed)



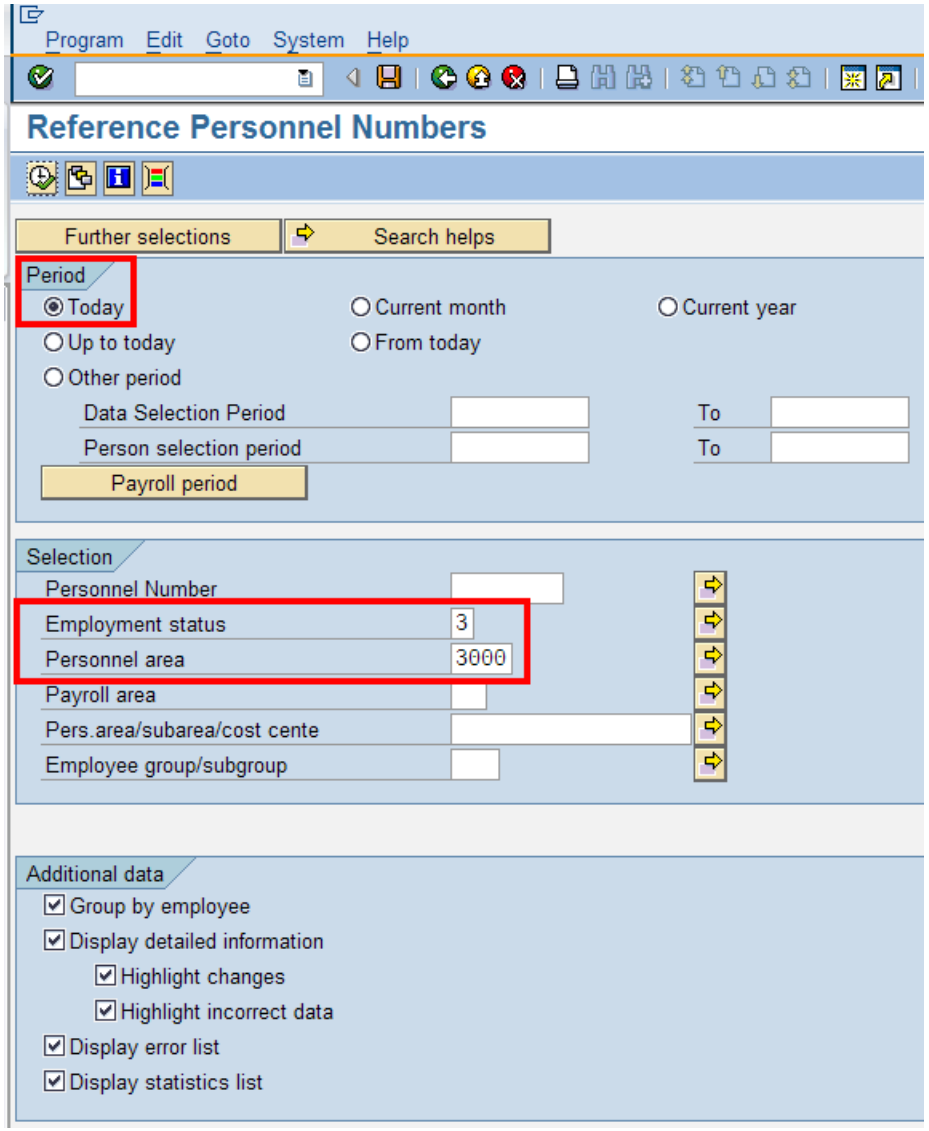
Reference Personnel Numbers

- From the Selection box, select the desired fields.
  - **Employment Status**
  - **Personnel area**
- Click **(Choose)** to select the fields.
- Click **(Continue (Enter))**.

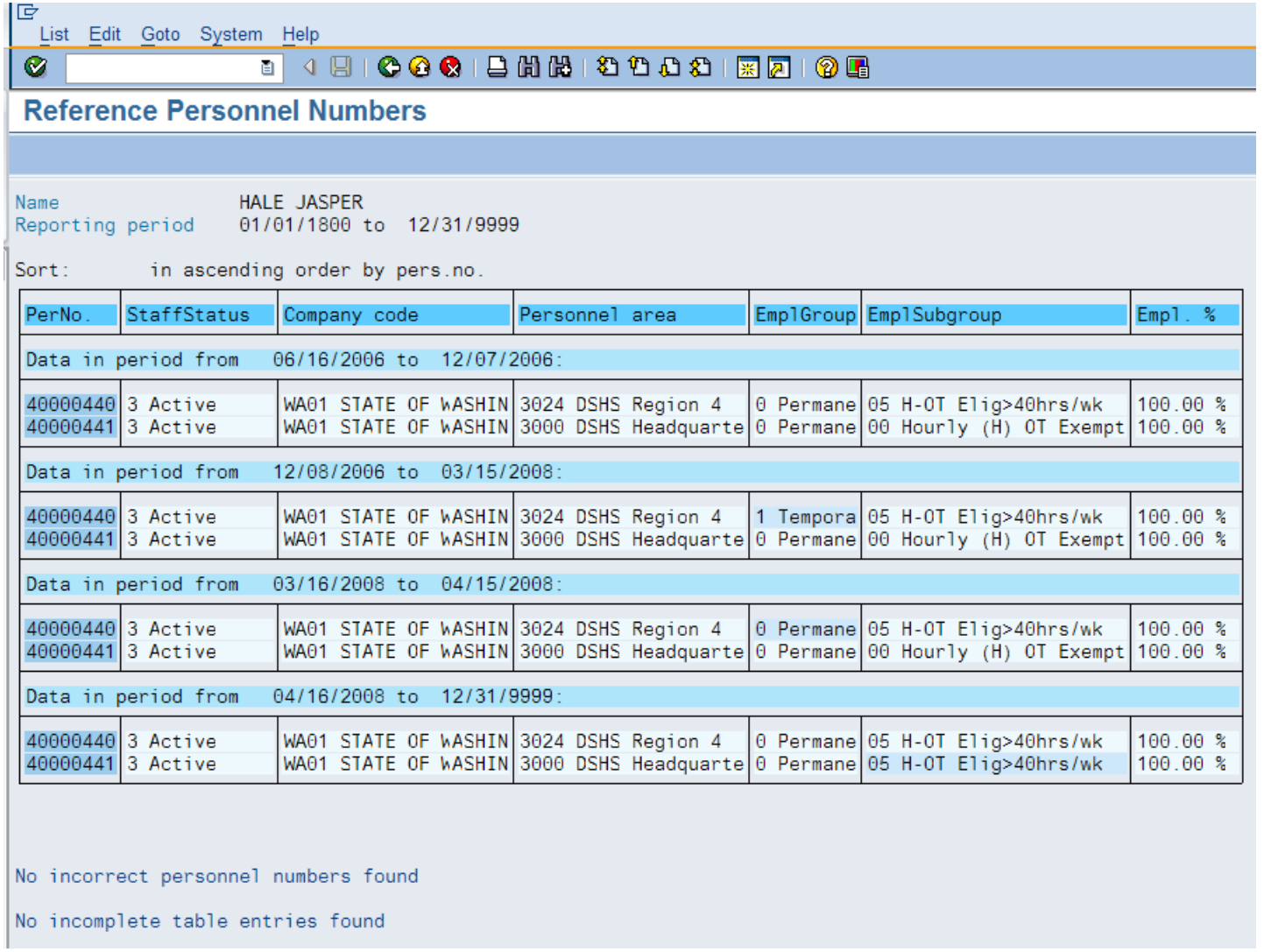


Reference Personnel Numbers

- Fields to complete:
  - **Employment Status**
    - (3 – Active)
  - **Personnel Area**
    - (3008 – DSHS WSH)
- Click **(Execute)**.



Viewing Results: Reference Personnel Numbers

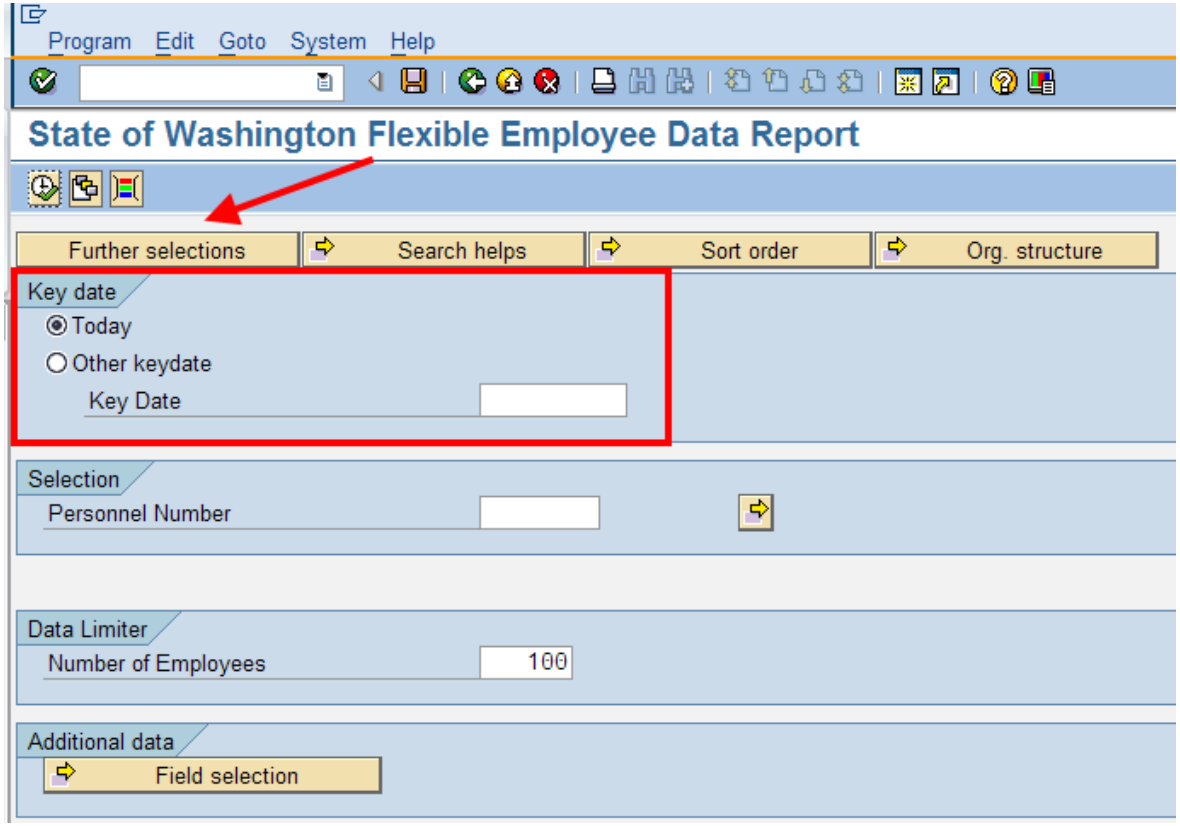


Flexible Employee Data Report

- Provides agency users the ability to create their own reports by selecting from a dropdown list of fields designated for end user ADHOC reporting.
- Security authorization to view selected fields will be driven by the end users active security profile. Only authorized employee records and associated infotype fields will be presented in the report.
- HRMS also provides a standard Flexible Employee Data report. This report has the same selection concepts, but provides additional field options. To access the standard report, use transaction code **S_AHR_61016362**.
- Access the customized report using the transaction code **ZHR_RPTPAN02**.

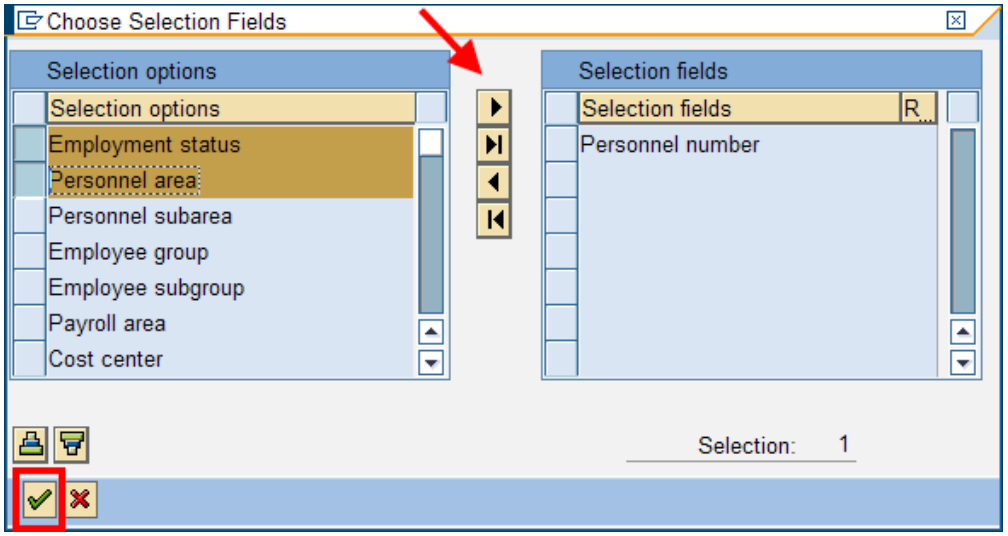
Flexible Employee Data Report – ZHR_RPTPAN02

- Enter a Key Date.
- To add additional Selection fields click on the Further Selection option. (Personnel Area and Employment Status is currently not displayed)



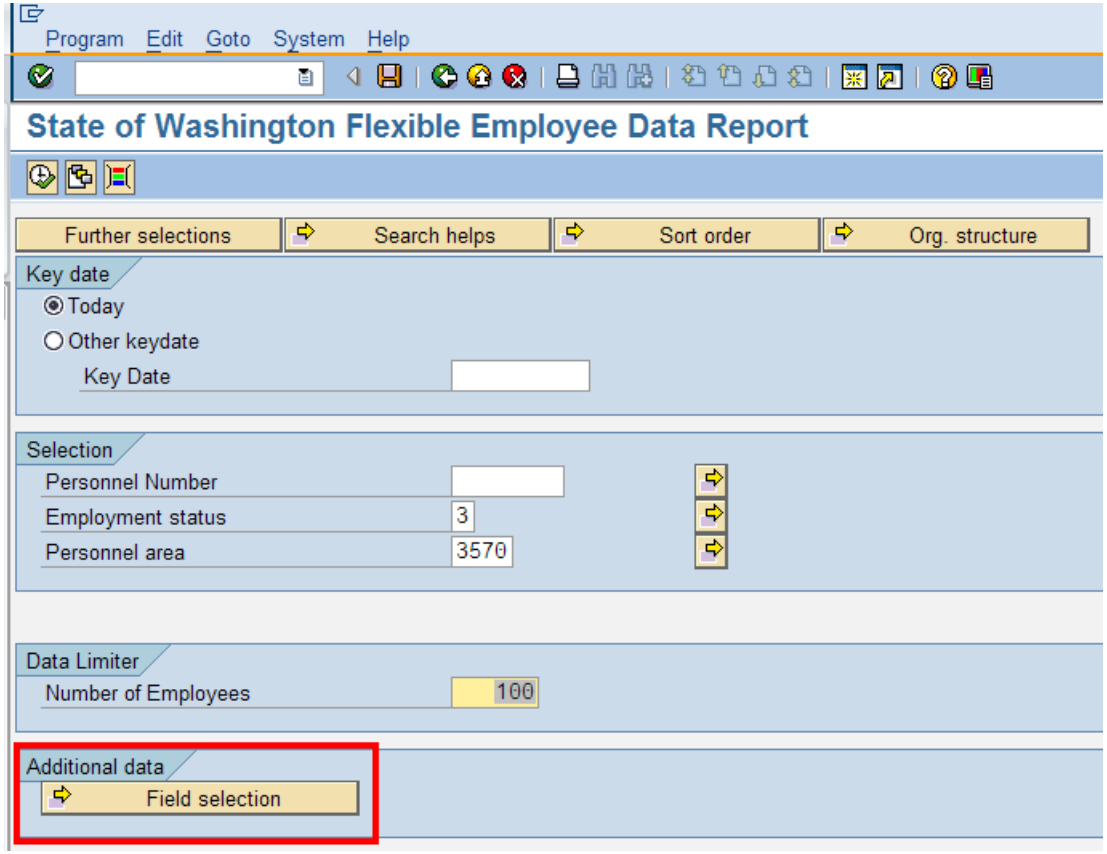
Flexible Employee Data Report – ZHR_RPTPAN02

- From the Selection box, select the desired fields.
  - **Employment Status**
  - **Personnel area**
- Click **(Choose)** to select the fields.
- Click **(Continue (Enter))**.



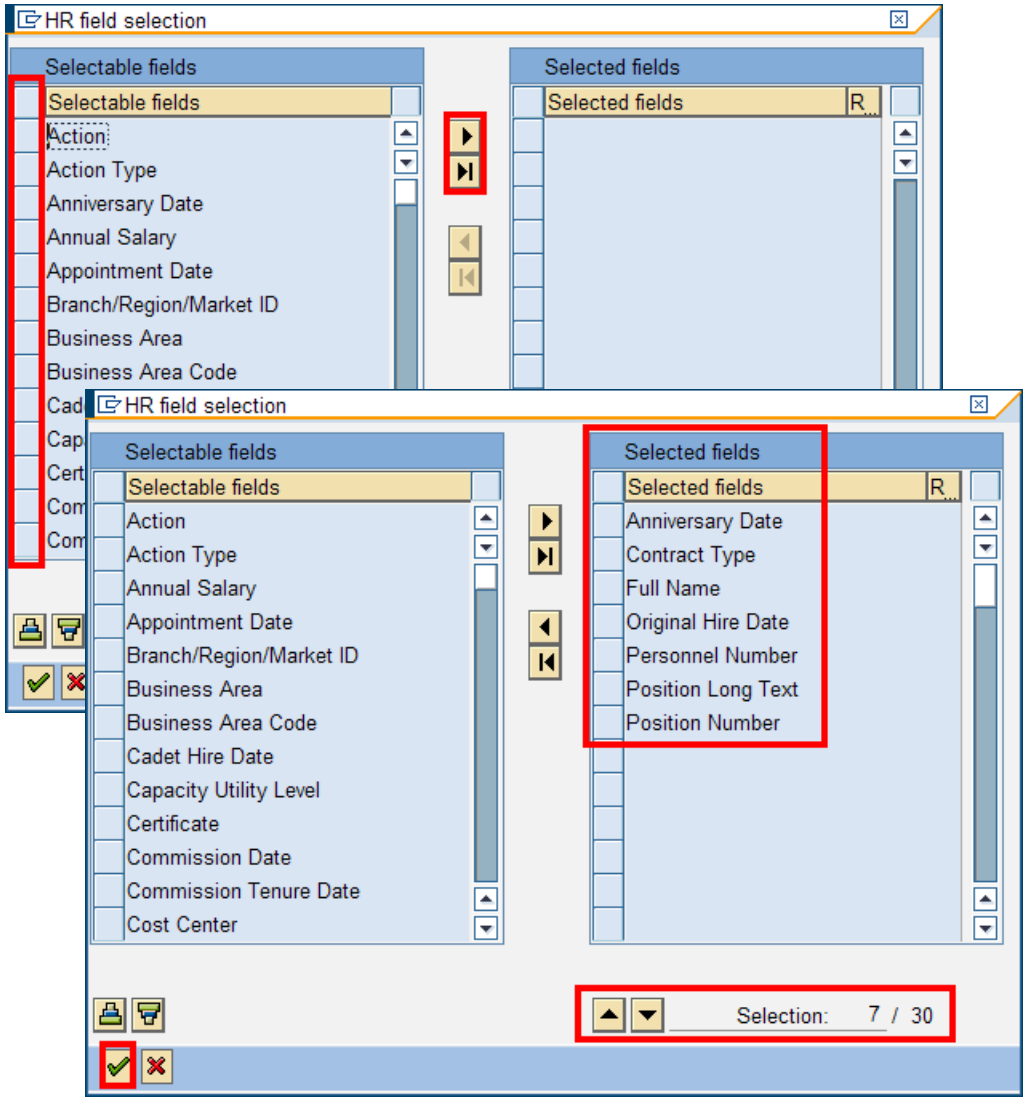
Flexible Employee Data Report – ZHR_RPTPAN02

- In the Additional Data section, select the Field selection to display additional data on the report.



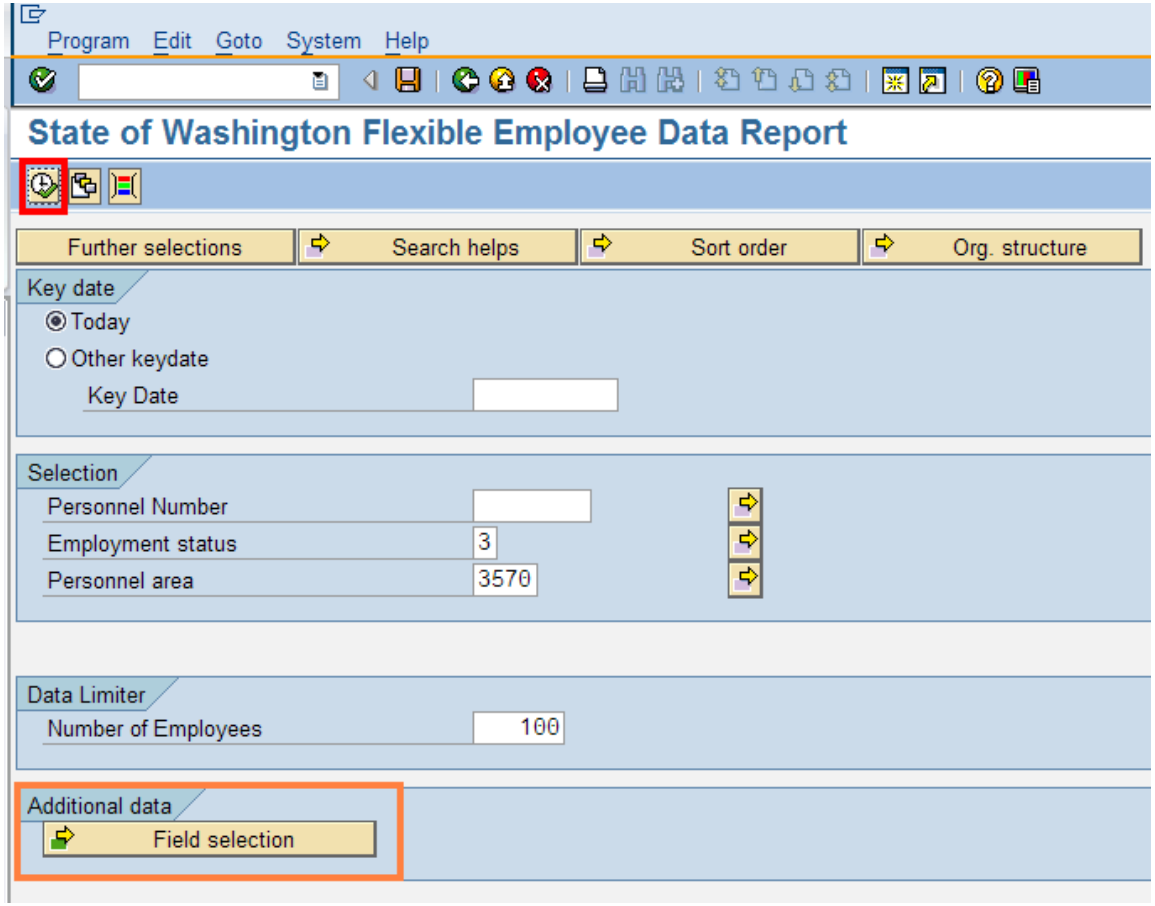
Flexible Employee Data Report – ZHR_RPTPAN02

- In the Additional Data section, select the Field selection to display additional data on the report.
- Click on the box to the right of the Selectable fields, then click on the (choose arrows) to move the selected items to the Selected fields area.
- Click **(Continue)** to return to the report.



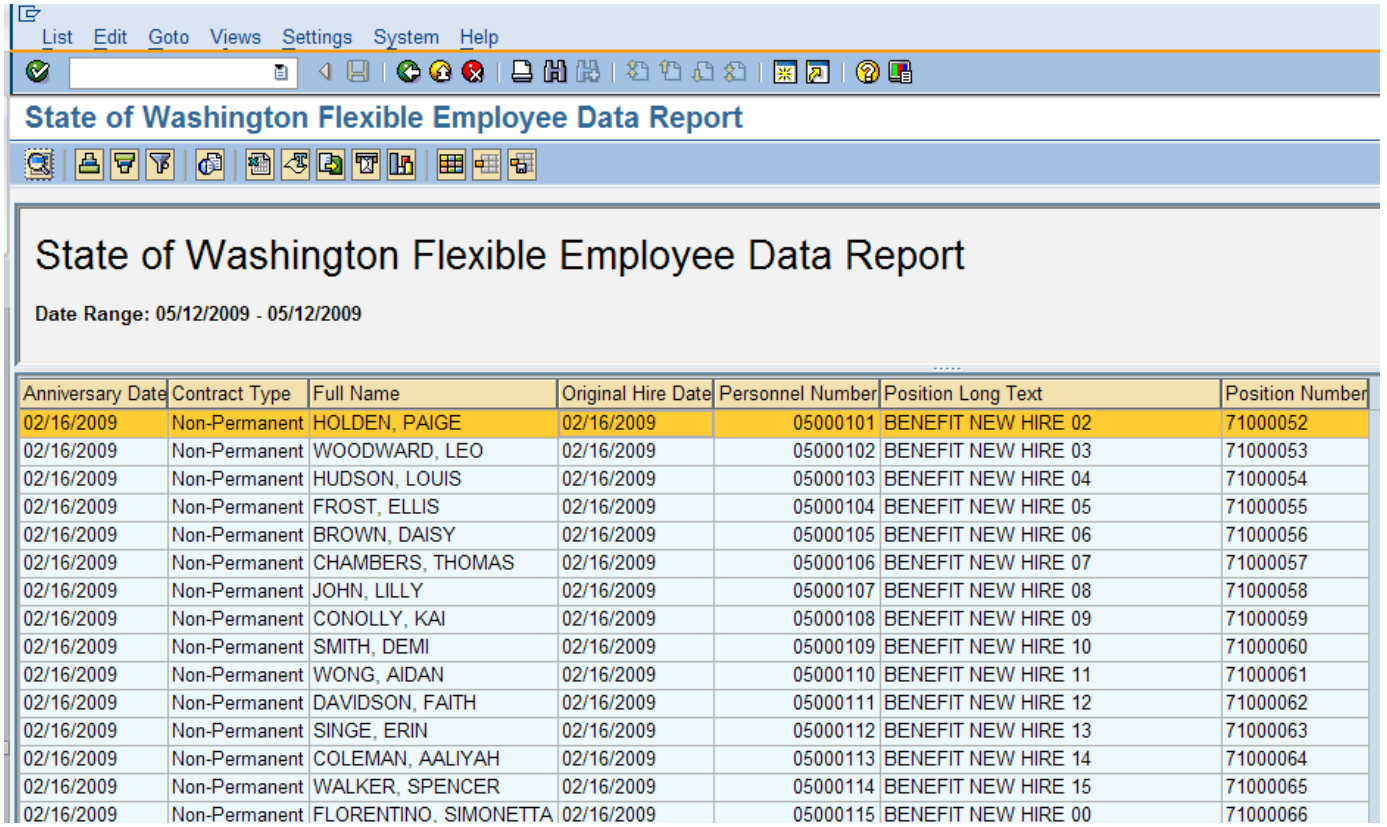
Flexible Employee Data Report – ZHR_RPTPAN02

- Click **(Execute)** to execute the report.



Viewing Results: Flexible Employee Data Report

- In this example, the report displays the Employee's Contract Type, First Name, Last Name and Personnel Number.



State of Washington Flexible Employee Data Report

Date Range: 05/12/2009 - 05/12/2009

Anniversary Date	Contract Type	Full Name	Original Hire Date	Personnel Number	Position Long Text	Position Number
02/16/2009	Non-Permanent	HOLDEN, PAIGE	02/16/2009	05000101	BENEFIT NEW HIRE 02	71000052
02/16/2009	Non-Permanent	WOODWARD, LEO	02/16/2009	05000102	BENEFIT NEW HIRE 03	71000053
02/16/2009	Non-Permanent	HUDSON, LOUIS	02/16/2009	05000103	BENEFIT NEW HIRE 04	71000054
02/16/2009	Non-Permanent	FROST, ELLIS	02/16/2009	05000104	BENEFIT NEW HIRE 05	71000055
02/16/2009	Non-Permanent	BROWN, DAISY	02/16/2009	05000105	BENEFIT NEW HIRE 06	71000056
02/16/2009	Non-Permanent	CHAMBERS, THOMAS	02/16/2009	05000106	BENEFIT NEW HIRE 07	71000057
02/16/2009	Non-Permanent	JOHN, LILLY	02/16/2009	05000107	BENEFIT NEW HIRE 08	71000058
02/16/2009	Non-Permanent	CONOLLY, KAI	02/16/2009	05000108	BENEFIT NEW HIRE 09	71000059
02/16/2009	Non-Permanent	SMITH, DEMI	02/16/2009	05000109	BENEFIT NEW HIRE 10	71000060
02/16/2009	Non-Permanent	WONG, AIDAN	02/16/2009	05000110	BENEFIT NEW HIRE 11	71000061
02/16/2009	Non-Permanent	DAVIDSON, FAITH	02/16/2009	05000111	BENEFIT NEW HIRE 12	71000062
02/16/2009	Non-Permanent	SINGE, ERIN	02/16/2009	05000112	BENEFIT NEW HIRE 13	71000063
02/16/2009	Non-Permanent	COLEMAN, AALIYAH	02/16/2009	05000113	BENEFIT NEW HIRE 14	71000064
02/16/2009	Non-Permanent	WALKER, SPENCER	02/16/2009	05000114	BENEFIT NEW HIRE 15	71000065
02/16/2009	Non-Permanent	FLORENTINO, SIMONETTA	02/16/2009	05000115	BENEFIT NEW HIRE 00	71000066

Flexible Employee Data Report

- Review OLQR User Procedures for:
  - Flexible Employee Data
  - Flexible Employee Data Report_Indirect Value
  - Flexible Employee Data

HRMS Activity

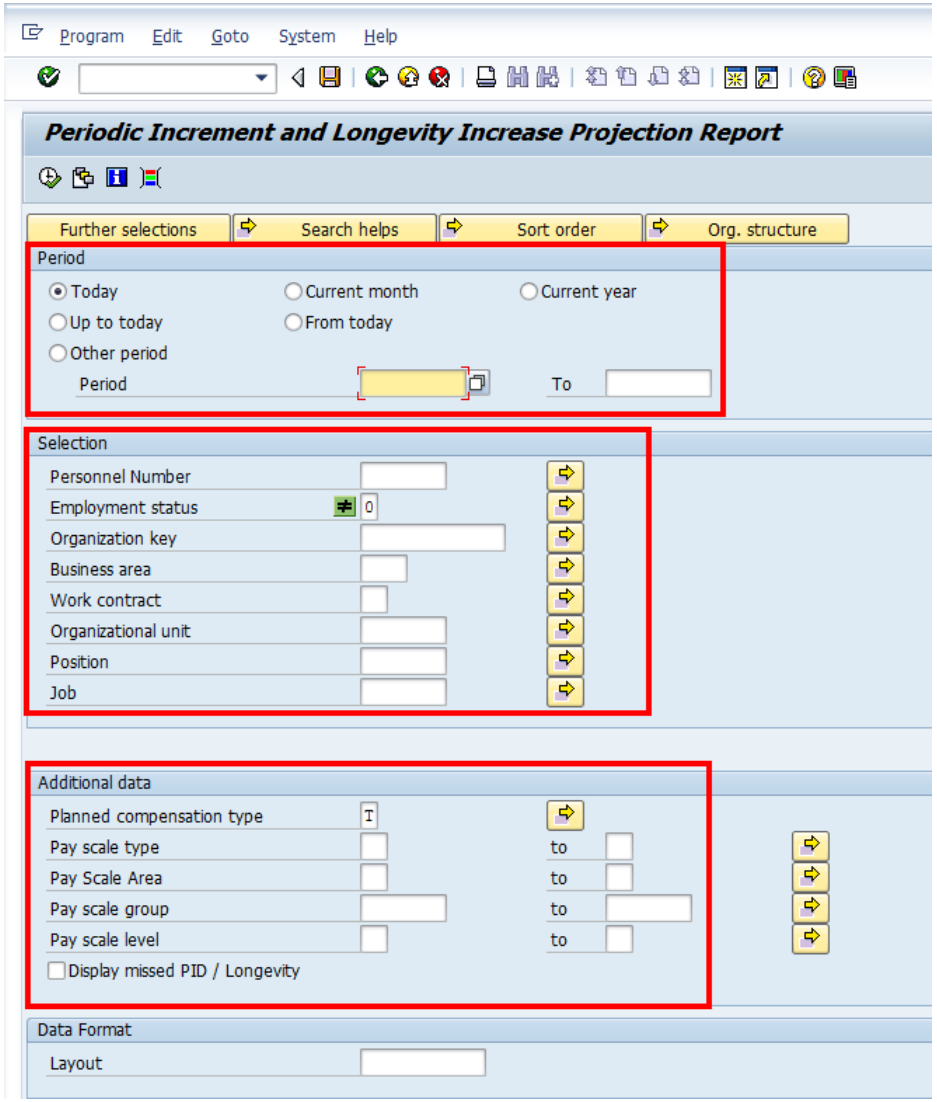
Flexible Employee Data Report – ZHR_RPTPAN02

Periodic Increment and Longevity Increase Projection Report

- Used to display current Pay Scale data and to project new Pay Scale data for periodic increment and longevity increases .
- Access the report using the transaction code **ZHR_RPTPA803**.

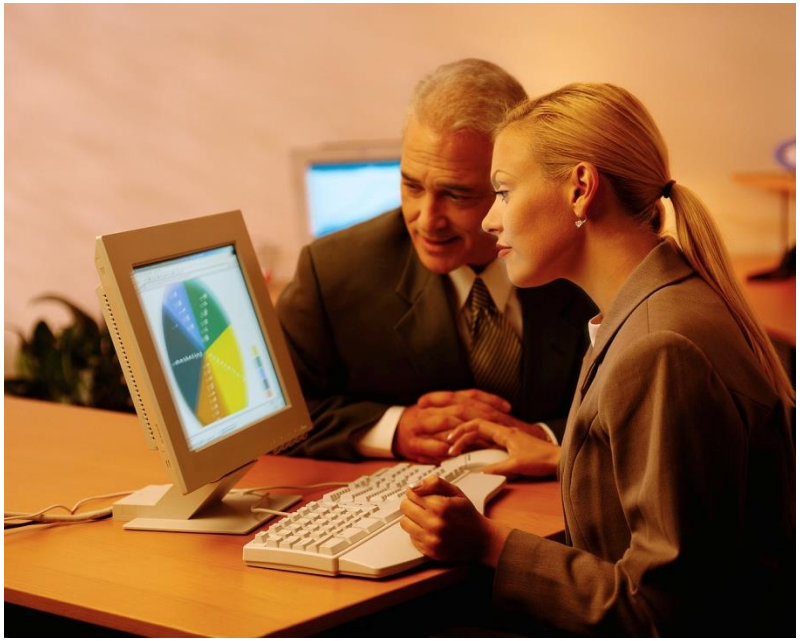
Periodic Increment and Longevity Increase Projection Report

- Complete the following fields:
  - **Personnel area**
  - **Business area**
- Choose a report type:
- Click **(Execute)** to execute the report.



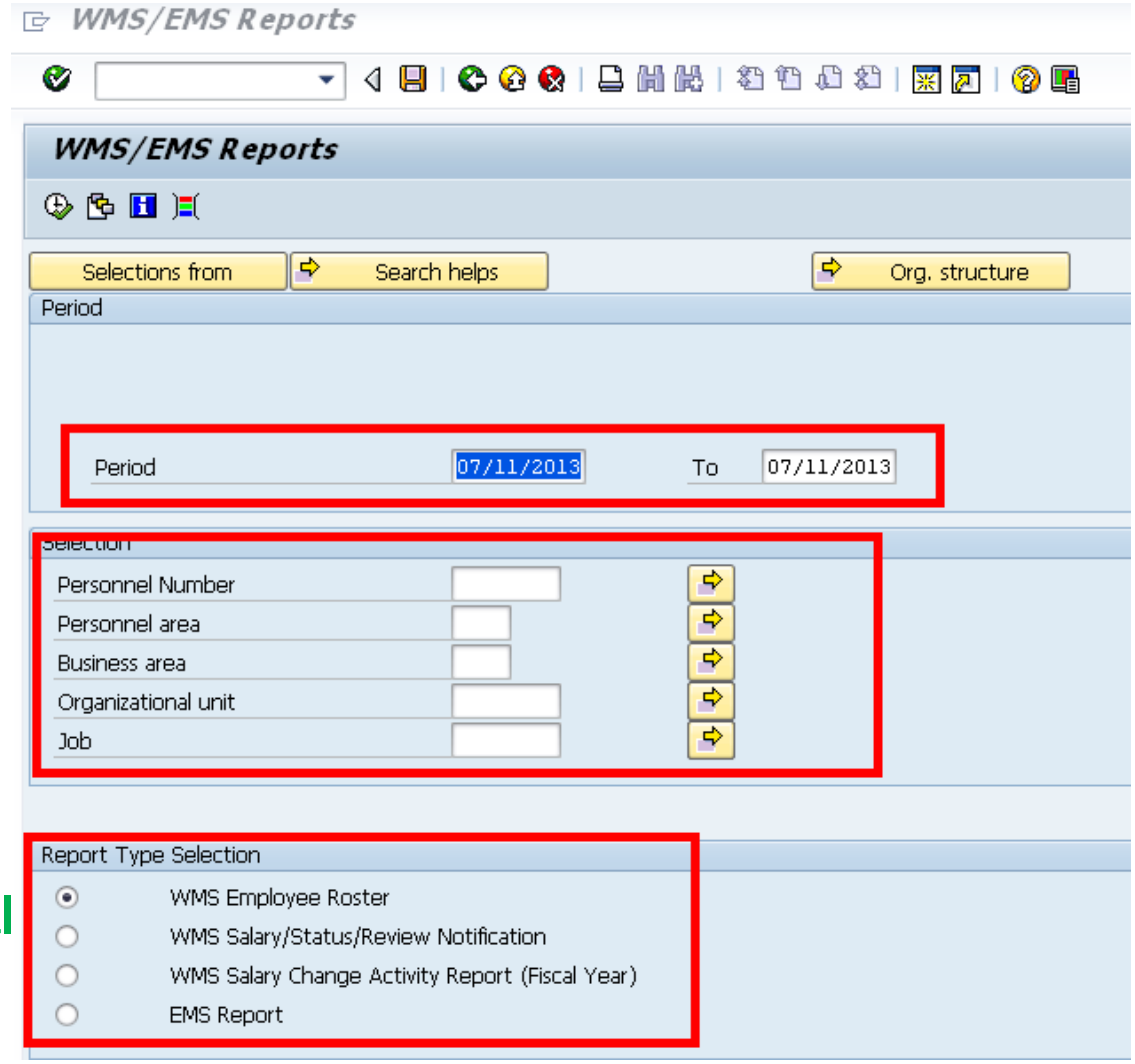
WMS/EMS Reports

- Used to identify WMS employees in the agency as well as their salary, status and review notification.
- Access the report using the transaction code **ZHR_RPTPA802**.

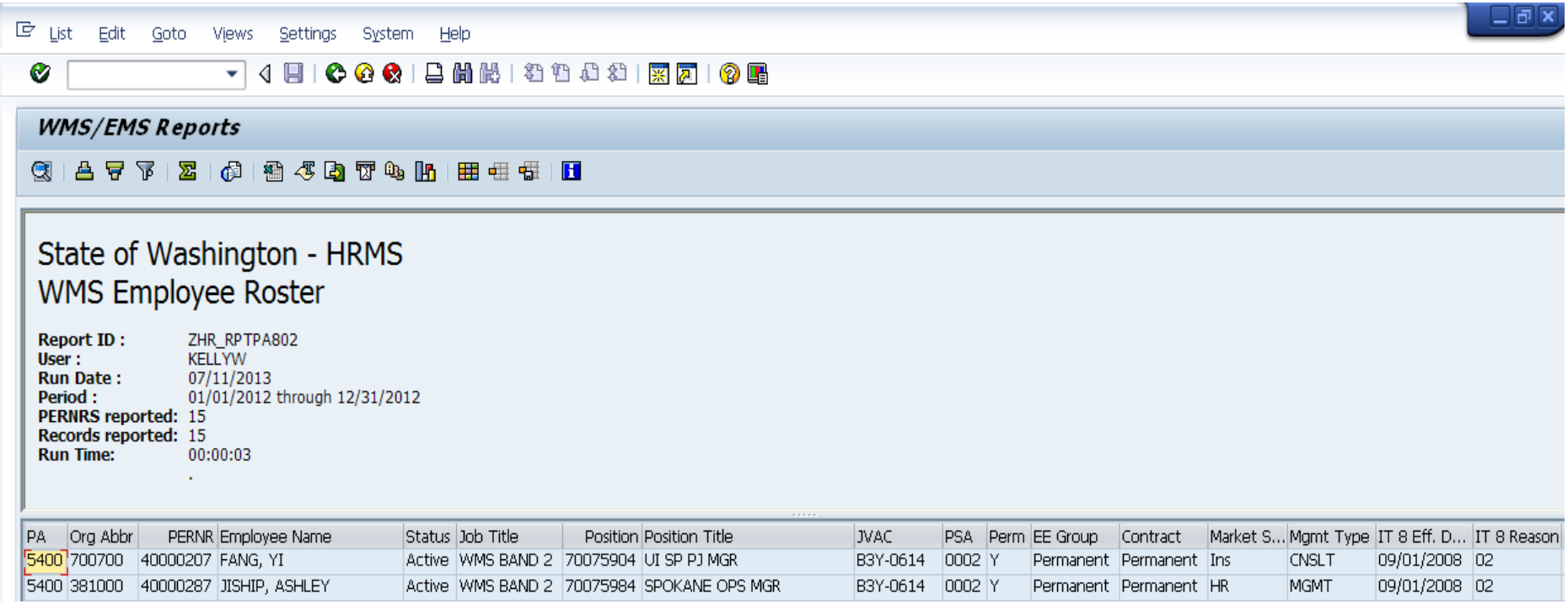


WMS/EMS Reports

- As required, enter the Period
- Conditional selection criteria include:
  - **Personnel area**
  - **Business area**
- Choose a report type:
  - **WMS Employee Roster**
  - **WMS Salary/Status/Review Notification**
  - **WMS Salary Change Activity Report (Fiscal Year)**
  - **EMS Report**
- Click **(Execute)** to execute the report.



Viewing Results: Washington Management Services Reports



PA	Org Abbr	PERNR	Employee Name	Status	Job Title	Position	Position Title	JVAC	PSA	Perm	EE Group	Contract	Market S...	Mgmt Type	IT 8 Eff. D...	IT 8 Reason
5400	700700	40000207	FANG, YI	Active	WMS BAND 2	70075904	UI SP PJ MGR	B3Y-0614	0002	Y	Permanent	Permanent	Ins	CNSLT	09/01/2008	02
5400	381000	40000287	JISHIP, ASHLEY	Active	WMS BAND 2	70075984	SPOKANE OPS MGR	B3Y-0614	0002	Y	Permanent	Permanent	HR	MGMT	09/01/2008	02

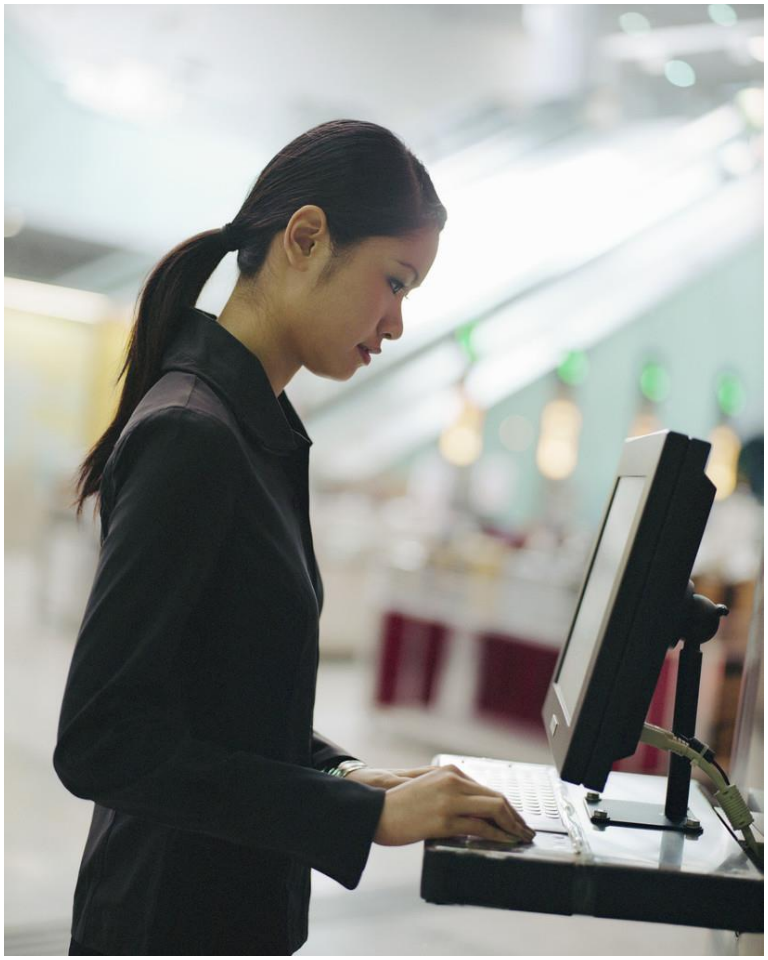
Note: Not a complete screen shot of the report.

HRMS Activity

WMS/EMS Reports – ZHR_RPTPA802

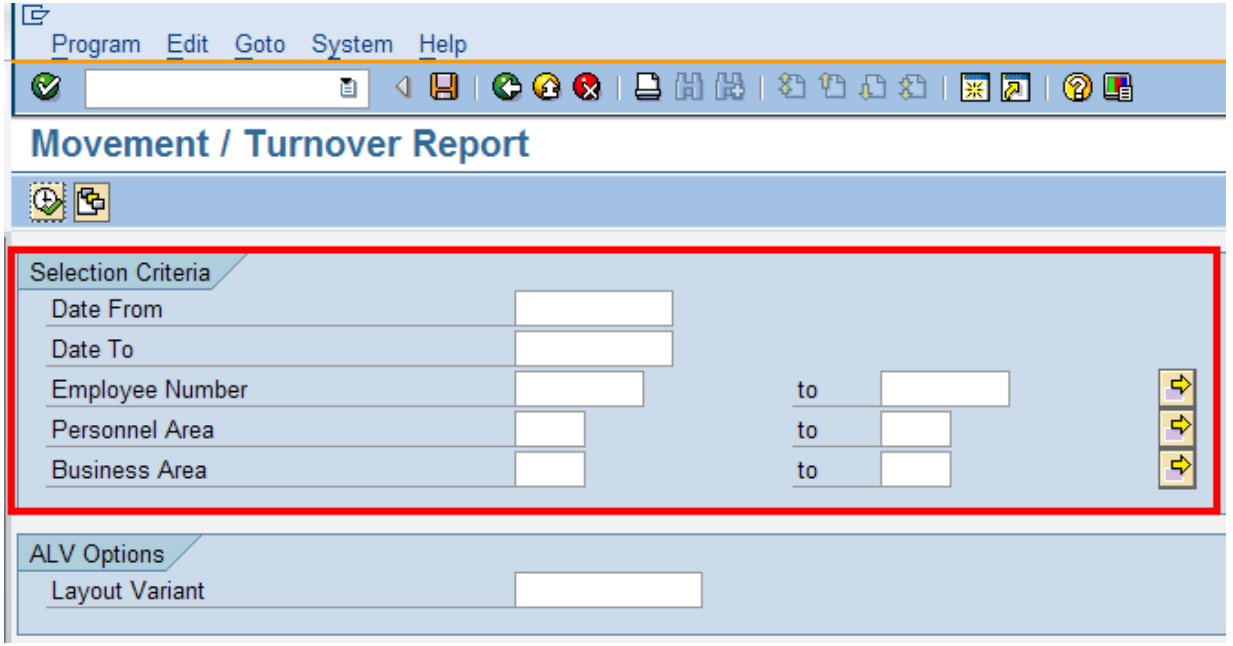
Movement – Turnover Report

- Used to identify employees who have left an agency or sub-agency (Business / Personnel Area); have been hired into the agency or sub-agency (Business / Personnel Area); or who have moved into another sub-agency (Personnel Area) within the agency (Business Area)
- Run the report when analysis on new hires is needed.
- Access the report using the transaction code **ZHR_RPTPYU26**.

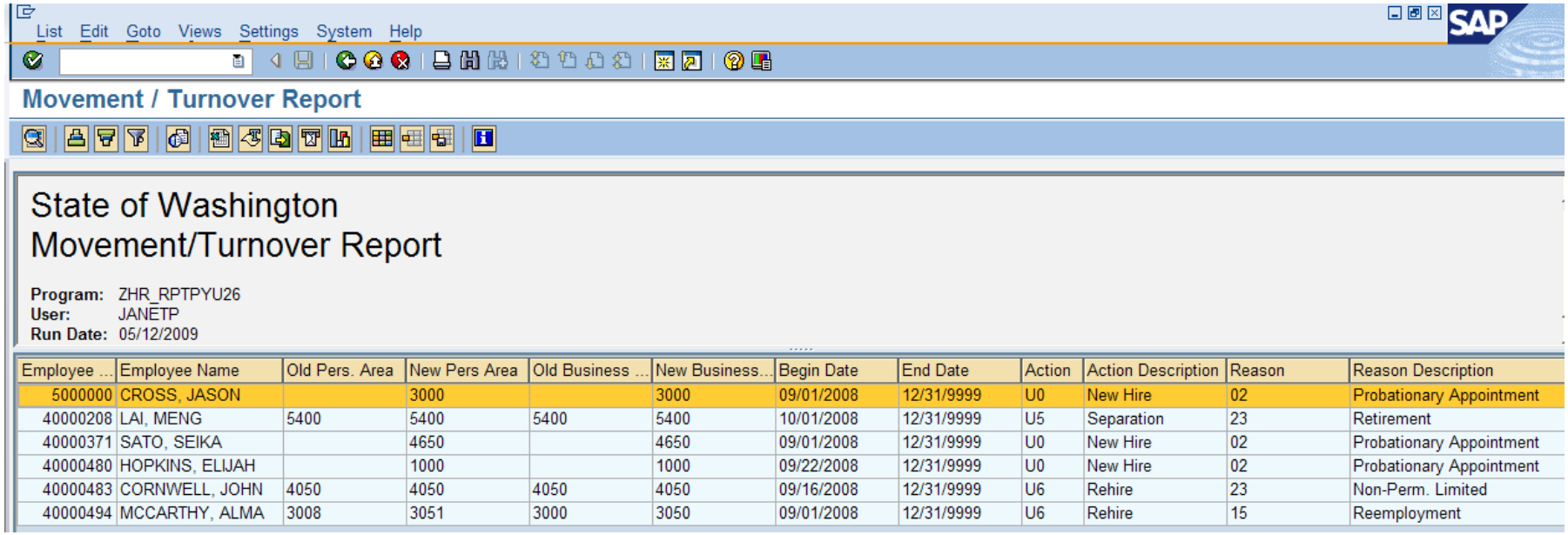


Movement – Turnover Report

- Conditional selection criteria include:
  - **Date From**
  - **Date To**
  - **Personnel Area** OR
  - **Business Area**
- Click **(Execute)** to execute the report.



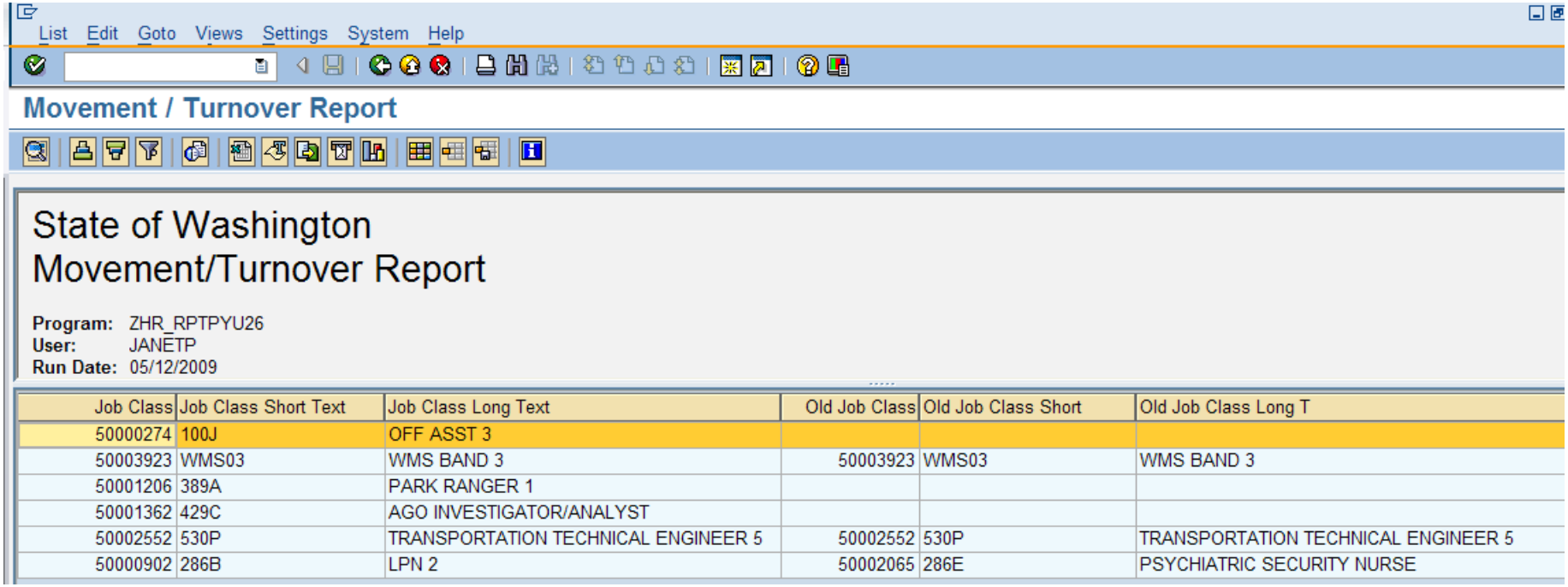
Viewing Results: Movement – Turnover Report



Employee ...	Employee Name	Old Pers. Area	New Pers Area	Old Business ...	New Business...	Begin Date	End Date	Action	Action Description	Reason	Reason Description
5000000	CROSS, JASON		3000		3000	09/01/2008	12/31/9999	U0	New Hire	02	Probationary Appointment
40000208	LAI, MENG	5400	5400	5400	5400	10/01/2008	12/31/9999	U5	Separation	23	Retirement
40000371	SATO, SEIKA		4650		4650	09/01/2008	12/31/9999	U0	New Hire	02	Probationary Appointment
40000480	HOPKINS, ELIJAH		1000		1000	09/22/2008	12/31/9999	U0	New Hire	02	Probationary Appointment
40000483	CORNWELL, JOHN	4050	4050	4050	4050	09/16/2008	12/31/9999	U6	Rehire	23	Non-Perm. Limited
40000494	MCCARTHY, ALMA	3008	3051	3000	3050	09/01/2008	12/31/9999	U6	Rehire	15	Reemployment

Note: The report allows you to go directly into the employee's HR Master Data by double-clicking on the employee's record in the report results.

Viewing Results: Movement – Turnover Report



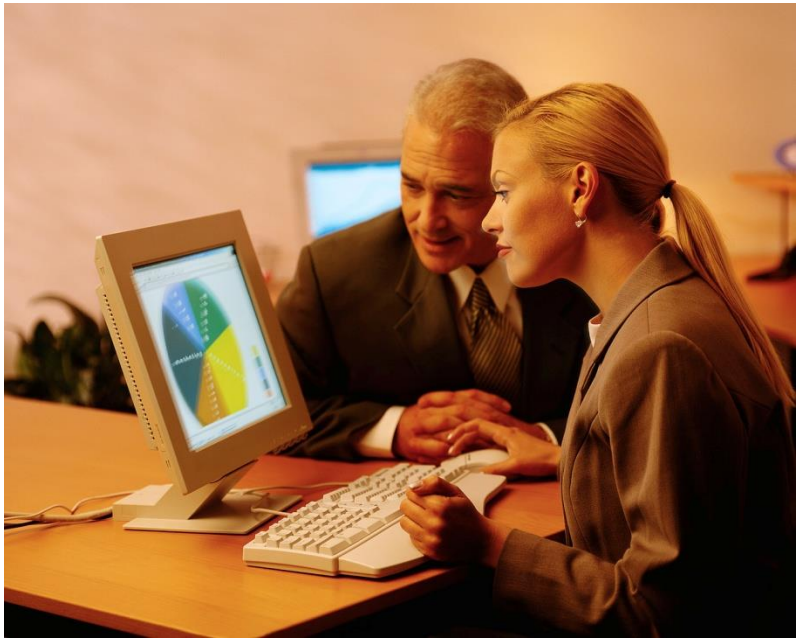
Job Class	Job Class Short Text	Job Class Long Text	Old Job Class	Old Job Class Short	Old Job Class Long T
50000274	100J	OFF ASST 3			
50003923	WMS03	WMS BAND 3	50003923	WMS03	WMS BAND 3
50001206	389A	PARK RANGER 1			
50001362	429C	AGO INVESTIGATOR/ANALYST			
50002552	530P	TRANSPORTATION TECHNICAL ENGINEER 5	50002552	530P	TRANSPORTATION TECHNICAL ENGINEER 5
50000902	286B	LPN 2	50002065	286E	PSYCHIATRIC SECURITY NURSE

HRMS Activity

Movement Turnover Report – ZHR_RPTPYU26

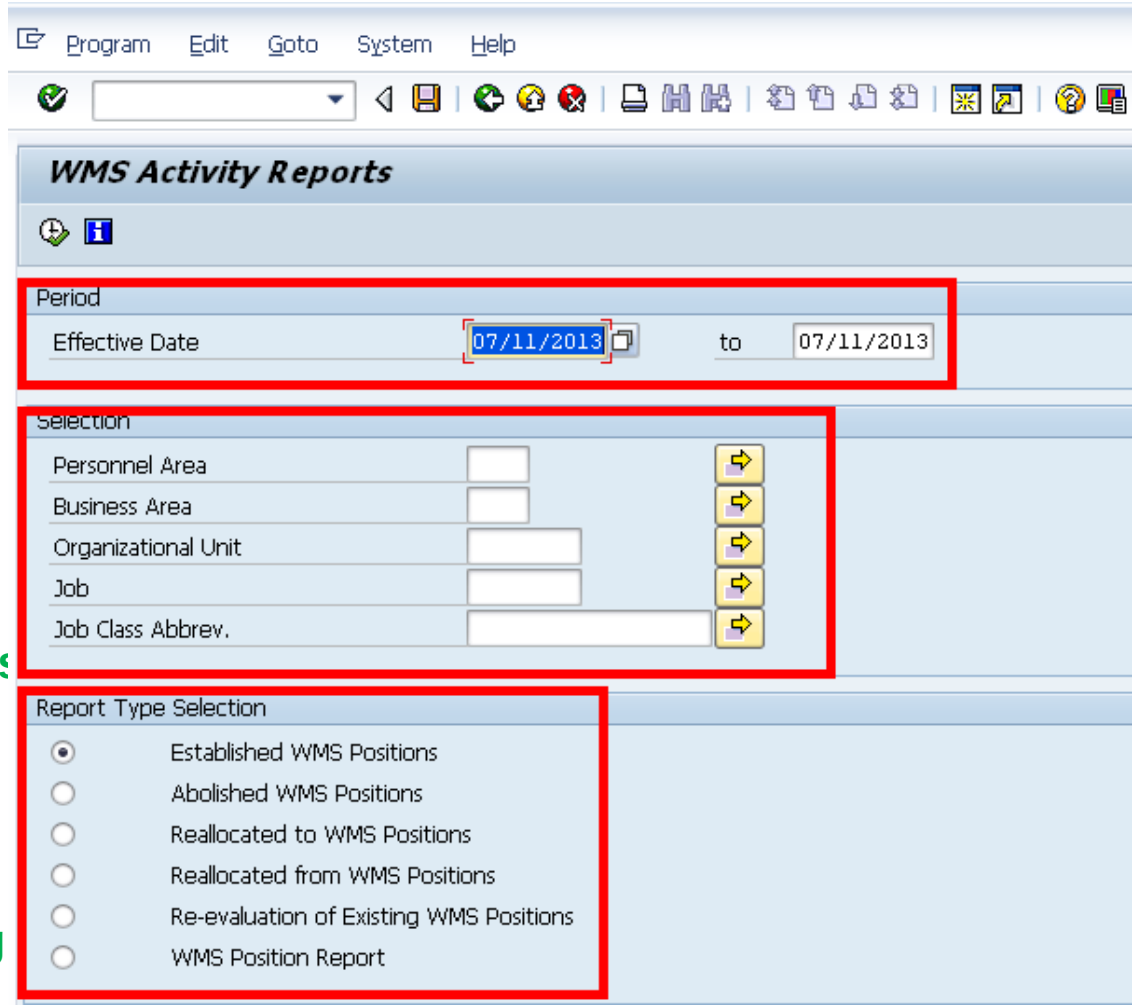
WMS Activity Reports

- Used to identify and monitor WMS positions and activities within the agency.
- 6 Reports within one
  - Established WMS Positions
  - Abolished WMS Positions
  - Reallocated from WMS Positions
  - Re-Evaluation of existing WMS Positions
  - WMS Positions
- Access the report using the transaction code **ZHR_RPTOMN03**.

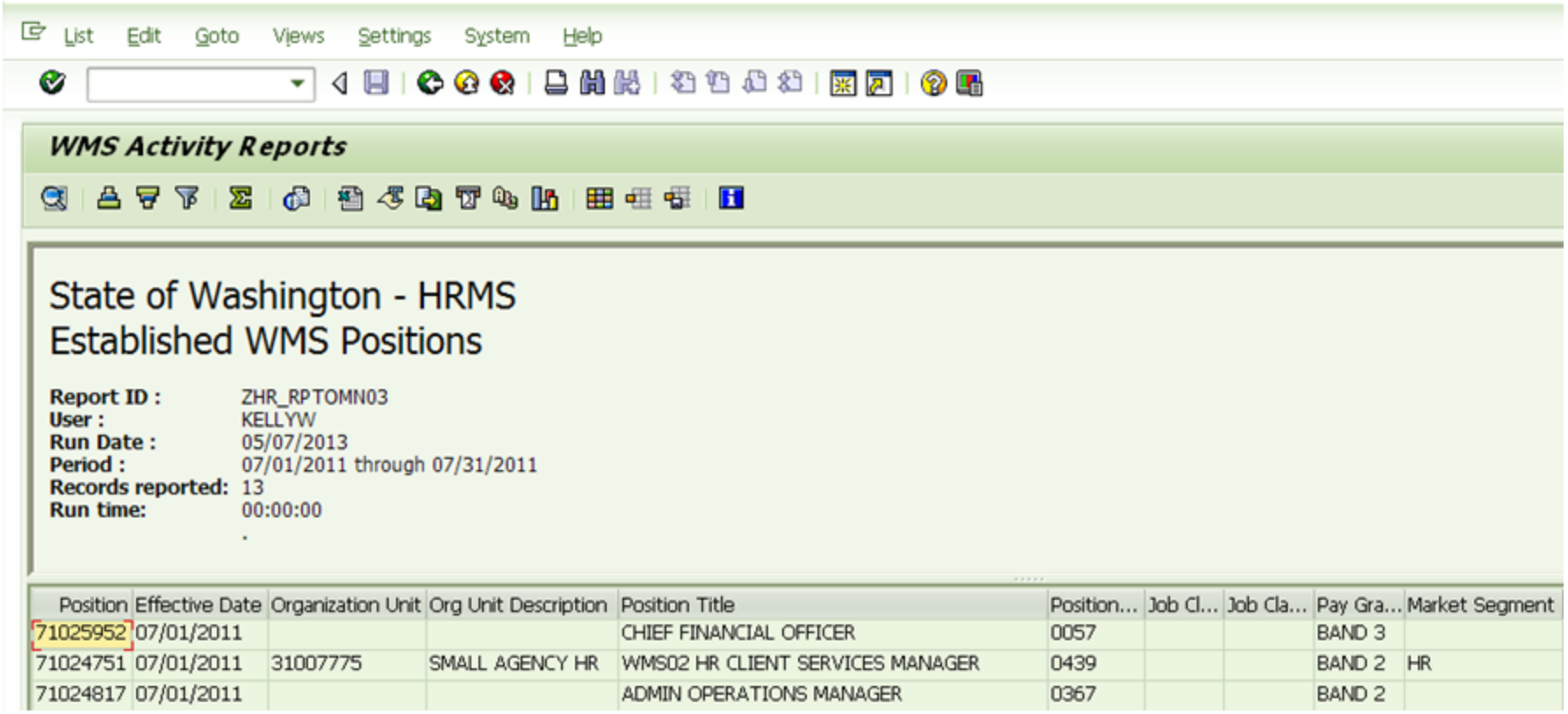


WMS Activity Reports

- As required, enter the Period
- Conditional selection criteria include:
  - **Personnel area**
  - **Business area**
- Choose a report type:
  - **Established WMS Positions**
  - **Abolished WMS Positions**
  - **Reallocated to WMS Positions**
  - **Reallocated from WMS Positions**
  - **Re-evaluation of Existing WMS Positions**
  - **WMS Position Report**
- Click **(Execute)** to execute the report.



Washington Management Services Reports



Position	Effective Date	Organization Unit	Org Unit Description	Position Title	Position...	Job Cl...	Job Cla...	Pay Gra...	Market Segment
71025952	07/01/2011			CHIEF FINANCIAL OFFICER	0057			BAND 3	
71024751	07/01/2011	31007775	SMALL AGENCY HR	WMS02 HR CLIENT SERVICES MANAGER	0439			BAND 2	HR
71024817	07/01/2011			ADMIN OPERATIONS MANAGER	0367			BAND 2	

Note: Not a complete screen shot of the report.

Summary

- **Throughout the course, you have learned to:**
  - Understand Personnel Administration Activities.
  - Hire and rehire an employee.
  - Display and change employee information.
  - Process an Employee Appointment Change.
  - Process a Leave of Absence.
  - Perform an Employee Separation.
  - Access Personnel Reports.
  - Access procedures in the OLQR.

Summary

- **Throughout the course, you have learned to:**
  - Understand Personnel Administration Activities.
  - Hire and rehire an employee.
  - Display and change employee information.
  - Process an Employee Appointment Change.
  - Process a Leave of Absence.
  - Perform an Employee Separation.
  - Access procedures in the OLQR.

HRMS Resources

- **The following resources are available for your use:**
  - DES Service Center– (360) 664–6400
    - ServiceCenter@DES.wa.gov
  - The Data Warehouse – http://dwsecure
  - The On-Line Quick Reference
    - http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference/
  - HRMS Support Website
    - http://www.hr.wa.gov/payroll/HRMS/HRMSSupport/Pages/default.aspx
  - HRMS Data Definitions
    - http://pub/payroll/HRMS/OnLineQuickReference/Pages/DataDefinitions.aspx

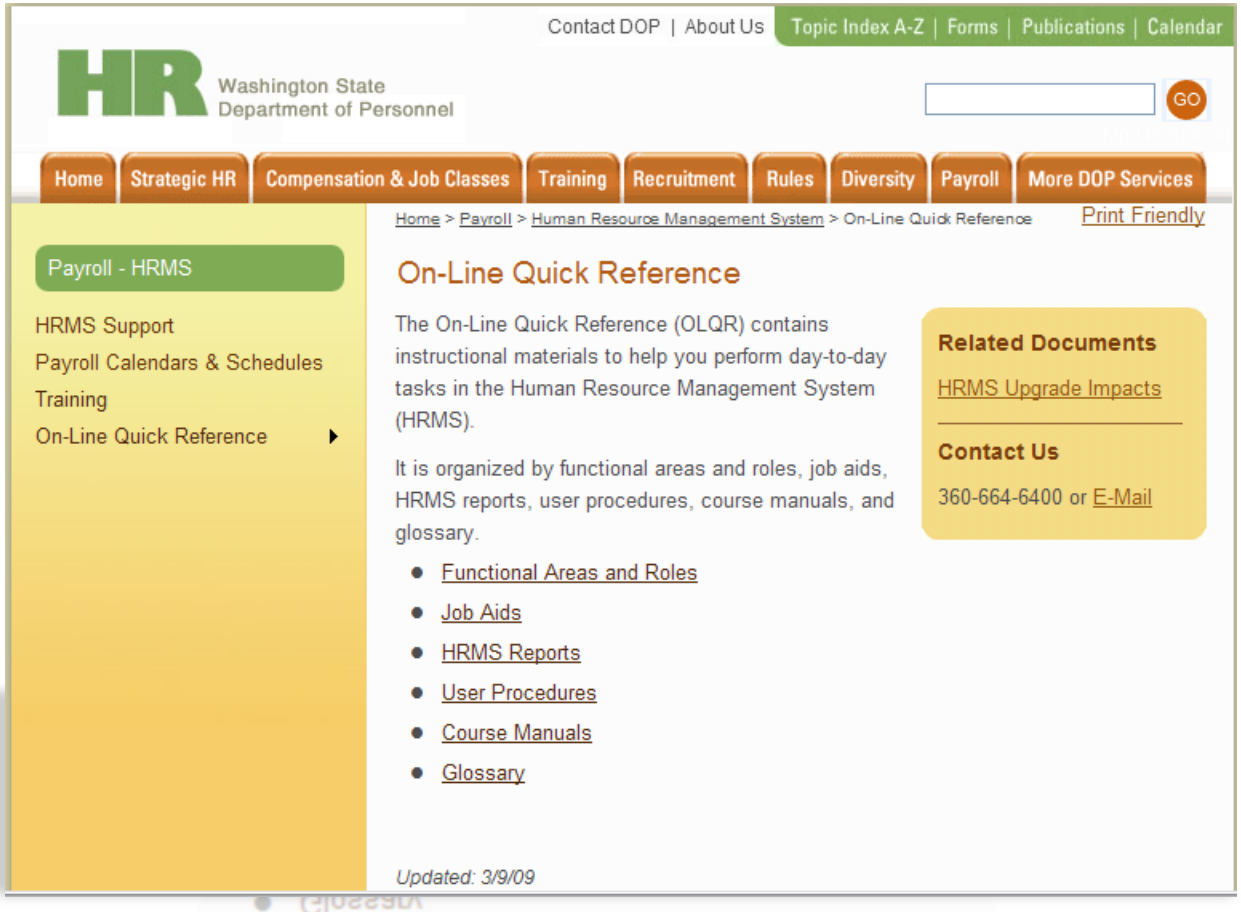
Other OLQR User Procedures

- Here is a list of other OLQR User Procedures that have not been mentioned in the course:
  - Addresses
  - Assign Badge Number
  - Basic Pay – Change Pay Scale to Pay Band (Salary)
  - Maintain Name Change
  - Military Service – Create
  - Military Service – Maintain
  - Monitoring of Tasks – Create and Maintain

On-line Quick Reference

OLQR is an acronym for the On-line Quick Reference tool.

It contains a glossary, job aids, system and user procedures that describe how to perform HRMS tasks step-by-step.



website address: http://www.hr.wa.gov/payroll/HRMS/OnLineQuickReference